SAMPLE DOCUMENTS:
a) Sole Source Statement

**Sole Source Statement**

Darcy Grant has worked with Princeton and Harvard Universities to implement academic research in the assets-building field. She specializes in tax time behavioral interventions at VITA sites. In 2008 she was awarded the prestigious Innovator-in-Residence grant from the Center for Economic Development in Washington, DC for her work implementing behavioral studies in the assets building field. Ms. Grant has recently authored a paper (to be published October 2012) detailing the lessons from a year of designing and implementing behavioral interventions in the field.

Ms. Grant has worked with New York City’s Department of Consumer Affairs, the D.C. Treasury’s office, the City of San Francisco’s Treasury Office, the Annie E. Casey Foundation, the Ford Foundation, and the New America Foundation, and others to help design, implement, and study behavioral interventions impacting thousands of people. Ms. Grant was asked to consult with the U.S. Department of Health and Human Services as they designed their new multi-million dollar program to use behavioral science to augment and improve various DHHS programs.

The Annie E. Casey-Campaign for Working Families grant required a partner who had an academic background in behavioral science and policy as well as high-level research experience and field experience with low-income communities. Ms. Grant is uniquely qualified: She has a background in research- Ms. Grant was the Research Director of Aspen Institute’s Education Program and a Senior Researcher with Harvard and Princeton; as well as experience working in the field with non-profits- Ms. Grant ran an after-school tutoring program in low-income areas of Puerto Rico and Washington, D.C. Ms. Grant also holds a Master’s degree in Public Policy from the Woodrow Wilson School at Princeton where she focused on the interaction of behavioral science and public policy in domestic areas.

We also wanted a research partner who had prior experience working with this particular tax site, The Campaign for Working Families in Philadelphia. Ms. Grant spent the past year and half running two tax-time behavioral interventions with the Campaign for Working Families so she knew the site, its staff, leadership, and data systems intimately. Ms. Grant is the only one with this particular background and she is uniquely qualified.
b) Sole Source Statement

**Sole Source Statement**

In selecting a venue for the 2011 Conference, we considered the following four factors: location, facilities, availability, and price.

We wanted a hotel that was located conveniently in or near Washington, D.C., available on the dates preferred by the attendees and the sponsor, and in the means of the budget. In addition, we needed to hold the conference in October or November with a Thursday to Saturday meeting pattern (Wednesday night arrival) to allow for greater academic participation, and we needed to avoid particular dates that could pose conflicts (including holidays and other conferences).

We asked the grant sponsor for recommendations and received the following suggestions: L’Enfant Plaza Hotel, Crystal City Sheraton, and Washington Court Hotel.

The Crystal City Sheraton was recommended by the sponsor. They proposed availability for October 6-8, 13-15, 20-22, and 28-30. The food and beverage minimum was $25,000 plus 22% service charge and 9% sales tax. This proposal was outside our budget, and therefore the Crystal City Sheraton could not meet our needs.

The Washington Court Hotel was the venue we used for this event in 2009 and 2010. They proposed several date options, but were unable to offer a Thursday to Saturday meeting pattern away from our conflicting dates. The date options that were feasible (but not ideal) were Monday, October 17 – Wednesday, October 19 and Monday, October 31 – Wednesday, November 2. The sleeping rooms for both blocks were available for $211 per night plus 14.5% sales tax. The meeting rooms were $675 per day for the plenary sessions and $375 per day for the breakout spaces. The facilities are sufficient, but not ideal because the meeting rooms are scattered throughout the hotel instead of centrally located. The location was sufficient, but was not directly on a metro line and inconvenient for guests not staying overnight at the hotel. The proposal was not ideal because of the available meeting pattern, facilities, and location.

The L’Enfant Plaza Hotel was also recommended by the sponsor. They proposed availability for Wednesday, October 20 – Friday, October 22. This proposal was within our budget and is the least expensive of all the options. The sleeping rooms were $209 per night plus 14.5% sales tax, and the meeting rooms were complimentary. The food and beverage minimum is $7,060. The facilities were ideal with the meeting spaces for our group locate on one floor of the hotel and easy to navigate. The hotel is conveniently located on several metro lines. In considering location, facilities, availability, and price, we have determined that the L’Enfant Plaza Hotel meets all our needs and is the best option for the group.
c) Sole Source Statement

**Sole Source Statement**

The Seattle School District is named in the sponsoring agency award documentation for this project and will be providing participants for the research study; therefore no other entity could provide the contracted services.