

j. Personal and Business Relationships Disclosure Form

State employees and officers and special State officers and employees who are involved in the procurement process must fill out a Personal and Business Relationships Disclosure (PBRD) Form. Involvement in the procurement process entails drafting, reviewing evaluating or awarding contracts, substantively assisting in those tasks or authorizing payment under such contracts. The purpose of the PBRD form is to assist State officials involved in procurement in detecting potential conflicts of interest that require recusal.

General Guidelines for Disclosure:

Personal Relationships

Disclose relationships with:

- Family members/relatives
- Friends
- Work Colleagues
- Neighbors you interact with regularly
- Members of professional and trade organizations you see regularly
- Former classmates you have ongoing relationships with
- Persons you socialize with, such as dining, golfing, visiting for the holidays
- Persons you work with in the community
- Persons you have more than casual interaction with

Business Relationships

Disclose interests in firms, associations, partnerships, corporations or other business organizations that do business with your agency or seek to do business with your agency.

Professional Relationships

Disclose relationships with professionals who do business with your agency or seek to do business with your agency, including but not limited to:

- Attorneys
- Accountants
- Contractors
- Doctors
- Electricians
- Engineers
- Landscapers
- Plumbers

Disclosure Period

Personal, business and professional relationships must be disclosed for five years prior to initial completion of the form up to the date of filing. After the initial filing, the form should be reviewed to ensure that it is correct and complete and must be updated as necessary when there is a material change to any response.

Review and Processing

Each agency head is responsible for determining the procedure for review of the PBRD form. Forms must be copied to the SEC.

Recusal

If a State employee or special State officer has a business, personal or professional relationship with an entity or individual seeking to contract with his/her State agency, or at another agency where he/she is involved in the procurement process, the employee or SSO must recuse from any involvement in the procurement process involving the entity or individual. The recusal must be in writing, filed with the ELO and copied to the SEC