

Strategic Planning

**Department of Health and Human Resources
Bureau for Children and Families
Five Year Strategic Plan**

RFQ# BCF90050

September 4, 2008

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**PROCURING DIVISION
STATE OF WV**

Submitted to:
Roberta Wagner
Department of Administration
Purchasing Division
Building 15
2019 Washington Street, East
Charleston, WV 25305-0130

Submitted by:
Policy Studies Inc.
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Performance Service Integrity

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September 2, 2008

Roberta Wagner
Department of Administration
Purchasing Division
2019 Washington Street, East
Charleston, WV 25305-0130

Dear Ms. Wagner:

As a registered vendor for the State of West Virginia, Policy Studies Inc. (PSI) is pleased to submit our response to the Department of Health and Human Resources (DHHR), Bureau for Children and Families (BCF) to assist in the development of a five year strategic plan and the establishment of an effective organizational vision for the future.

Our goal is to assist the BCF in the development of a plan to meet your goals for the children and families of West Virginia. We will work closely with your strategic planning team and designated subgroups to gather the necessary background and resource materials to gain a contextual understanding of the major issues you face in order to achieve your goal. From the first task of developing and implementing a work plan, to implementation, to the final task of developing a methodology to evaluate progress and measure outcomes, we will be your partner in making your five-year plan a success.

PSI brings an outstanding combination of skills to this project. We have been doing business process and organizational assessment, improvement, and re-engineering projects in a wide variety of human services settings for 25 years. These projects have led to improved program efficiencies and outcomes as well as roadmaps for the implementation of next-generation technologies. We practice what we preach because we have re-engineered business processes and organizational models in our own outsourced health and human services programs using the same methodology we propose for you.

We look forward to discussing our collaborative approach and how our team could assist the BCF in meeting its goals at your earliest convenience. Please contact me at 919-889-4401 if you have any questions or require any additional information.

Sincerely,

Chan Preston
Managing Director, Consulting

**GENERAL TERMS & CONDITIONS
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)**

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. All quotations are governed by the *West Virginia Code* and the *Legislative Rules* of the Purchasing Division
4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125.00 registration fee.
5. All services performed or goods delivered under State Purchase Orders/Contracts are to be continued for the term of the Purchase Order/Contract, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
6. Payment may only be made after the delivery and acceptance of goods or services.
7. Interest may be paid for late payment in accordance with the *West Virginia Code*.
8. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, this Contract may be deemed null and void, and terminated without further order.
14. **HIPAA Business Associate Addendum:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Covered Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
15. **West Virginia Alcohol & Drug-Free Workplace Act:** If this Contract constitutes a public improvement construction contract as set forth in Article 1D, Chapter 21 of the West Virginia Code ("The West Virginia Alcohol and Drug-Free Workplace Act"), then the following language shall hereby become part of this Contract: "The contractor and its subcontractors shall implement and maintain a written drug-free workplace policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act, as set forth in Article 1D, Chapter 21 of the West Virginia Code. The contractor and its subcontractors shall provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free work place policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act. It is understood and agreed that this Contract shall be cancelled by the awarding authority if the Contractor: 1) Fails to implement its drug-free workplace policy; 2) Fails to provide information regarding implementation of the contractor's drug-free workplace policy at the request of the public authority; or 3) Provides to the public authority false information regarding the contractor's drug-free workplace policy."

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division.
2. **SPECIFICATIONS:** Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Complete all sections of the quotation form.
4. Unit prices shall prevail in cases of discrepancy.
5. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
6. **BID SUBMISSION:** All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications:
Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130,
Charleston, WV 25305-0130



Mandatory Qualifications

RFQ Requirement: Vendor must provide a detailed work history, including references and resume(s) of project team to support mandatory qualifications.

PSI's Response: PSI's Consulting Division has been developing strategic plans for human services agencies since our inception in 1984.

STRATEGIC PLANNING

PSI's strategic planning model is based on a proven method that uses a flexible and comprehensive approach to involve participants in hands-on discussions and activities to implement each of the following four components:

- (1) In-depth visioning process
- (2) Organizational and system assessments
- (3) Long-range goals and improvement strategy development
- (4) Implementation structure and process.

We are skilled in bringing a variety of diverse stakeholders together to deal with difficult issues, helping participants provide meaningful input and reach important decisions under difficult time pressures. Our consultants pay close attention to creating a process that marries big picture "dreaming" with practical implementation strategies. After a formal planning document has been drafted, we work closely with our clients to develop a detailed implementation plan to ensure that the specifics of the document are transferred from the printed page into everyday operations. We often help customers create monitoring teams to review the progress of the plan on an ongoing basis and Implementation Teams to follow through on short-term priority projects. We also advise our clients to make tangible commitments to implementing the details of the plan, aligning an organization's budgeting and measurement processes with its operations priorities. By supporting both with the goals of a strategic plan, leaders can send a strong message about their commitment to the document.

Following are descriptions of two of PSI's successful strategic planning projects.

Court Organizational Assessment – Richmond, Virginia Juvenile and Domestic Relations (J&DR) District Court: 8/2004 to 5/2005. PSI consulted on the development of a strategic planning process. We worked with judges and court administrators to assess the organizational strengths and weaknesses of the Richmond J&DR Court. PSI conducted interviews with the judges and representatives from court intake, pre-court Clerk's Office staff, post-court Clerk's Office staff, probation, and the County Department of Social Services. In addition, PSI facilitated a focus group of prosecutors, defense attorneys, and guardians.

Court Strategic Planning – Dade County, Florida: 5/1/1998 to 12/3/2001. PSI helped the 11th Judicial Circuit Court of Florida to develop a long-range strategic plan by (1) describing and assessing the Circuit's capacity to provide justice services both currently and in the future, and (2) established a strategic agenda and



direction that will allow the Circuit to anticipate, plan for, and shape a more favorable future. PSI worked with the Circuit Court and its justice agency partners to examine case flow management procedures, court organization and structure, alternative dispute resolution and other service programs, human resources practices, budgeting, and information technology infrastructure and practices. Staff worked with the Circuit Court to help it develop a facilities master plan. This required staff to work with a planning committee to make strategic decisions about the number and location of court houses, service delivery expectations and needs, and decentralization of court functions.

An Example of our Strategic Planning Approach – Public Health

One area where we have done considerable strategic planning is in the area of public health. Our work in that area, which we describe in more detail below, has included facilitating strategic planning sessions for large and small state public health programs, separate organizations working on a particular issue in a state, regional public health collaborative organizations, and government health care systems. We provide the details of this work to illustrate the approach we use in strategic planning and range of services which are encompassed.

Research Expertise

Many of our public health consulting projects, from strategic planning to social marketing to training, involve the following extensive qualitative and/or quantitative research with key stakeholders and target audiences.

Surveys

PSI has developed and conducted surveys using traditional paper and pencil techniques, random-digit telephone surveys, and a new, Web-based approach on a number of public health and health care projects. We begin by meeting with our clients to define the survey's goals, key issues, distribution and retrieval mechanisms, and data analysis procedures. We then design the survey for our customer's approval, developing questions that use variety of techniques, from using a Likert scale to open-ended queries. We then pretest the survey with a small number of potential respondents to identify any problems. After making changes based on the testing, we distribute the survey to the target audience, in person, by phone, or through regular mail, e-mail, or fax. Throughout the collection process, we monitor the completion/submission of the surveys and contact individuals who have not responded within a reasonable timeframe or whose responses are confusing or incomplete. We then enter the information into a clean database, code open-ended questions, clean and edit the data, and once the process is complete, prepare a final database and data element dictionary. We can create the data file in many different formats depending on need (e.g., Microsoft Access, Excel, SPSS, SAS, ASCII), tabulating the data for the final report and preparing any ad-hoc tables that the customer wants for its own analysis purposes. We then write a final report summarizing the survey results.

For example, in June 2006, we conducted an online emergency preparedness needs assessment survey for the Massachusetts Department of Public Health (MDPH), which we sent to 351 boards of public health in the State. We also recently conducted a similar survey of health care providers in Massachusetts to inventory their availability of flu vaccine to help MDPH better understand the supply of the vaccine in the State and plan effective strategies for prioritization and redistribution purposes.



Literature Reviews

To conduct a thorough review of the available literature on a public health issue, PSI uses a variety of techniques that include searching for

- (1) Journal articles through databases such as PubMed, PsycInfo, and MassMedia Complete
- (2) Media reports, press releases, and congressional testimony through our subscription to the LexisNexis news service
- (3) Meeting abstracts, books, and other resources through the National Library of Medicine's Gateway
- (4) Web searches using general search engines and public health and health care web sites, such as the Cochrane Collaboration, and HHS's Prevention Communication Research Database
- (5) Subscriptions to issue-specific listservs that allow users to post research questions
- (6) Interviews with key experts to ensure that we have searched all relevant sources.

For example, we conducted a review of best practices related to risk communication for the Maine Bureau of Public Health (MBOH) that included information from CDC, FEMA, EPA, and leading risk communication experts such as Vincent Covello and Peter Sandman. Similarly, for the Rhode Island Department of Health's Healthy People 2010 state plan, we conducted a review of evidence-based strategies for each of the 10 national 2010 leading health indicators, researching landmark documents prepared by organizations such as the CDC, Institutes of Medicine, SAMHSA, and others.

Focus Groups

PSI has conducted focus groups with a wide variety of audiences, including health care providers, people at risk for specific diseases, members of the public, parents of young children, and program participants. Our focus group approach involves the four following steps

- (1) Development of a moderator's guide for customer approval
- (2) Group scheduling, recruitment, and planning of all logistics
- (3) Hosting groups—depending on the situation, we can audiotape and/or videotape each group and provide a summary of each session
- (4) Development of reports and presentation of findings

PSI then creates a comprehensive report of the focus group findings, including recommendations to the customers. The findings will include key themes and gaps and barriers to services identified by the group participants. We have conducted focus groups with a wide variety of audiences, including women eligible for Title X services, seniors at risk for West Nile Virus, homeless youth and injection drug users at risk for hepatitis C, health care providers treating patients with infectious and chronic diseases, and men who have sex with men at risk for STDs.

Key Informant Interviews

To obtain in-depth information not always available in a focus group, we often conduct detailed interviews with experts, local public health workers, community leaders, and others who can offer critical insights into

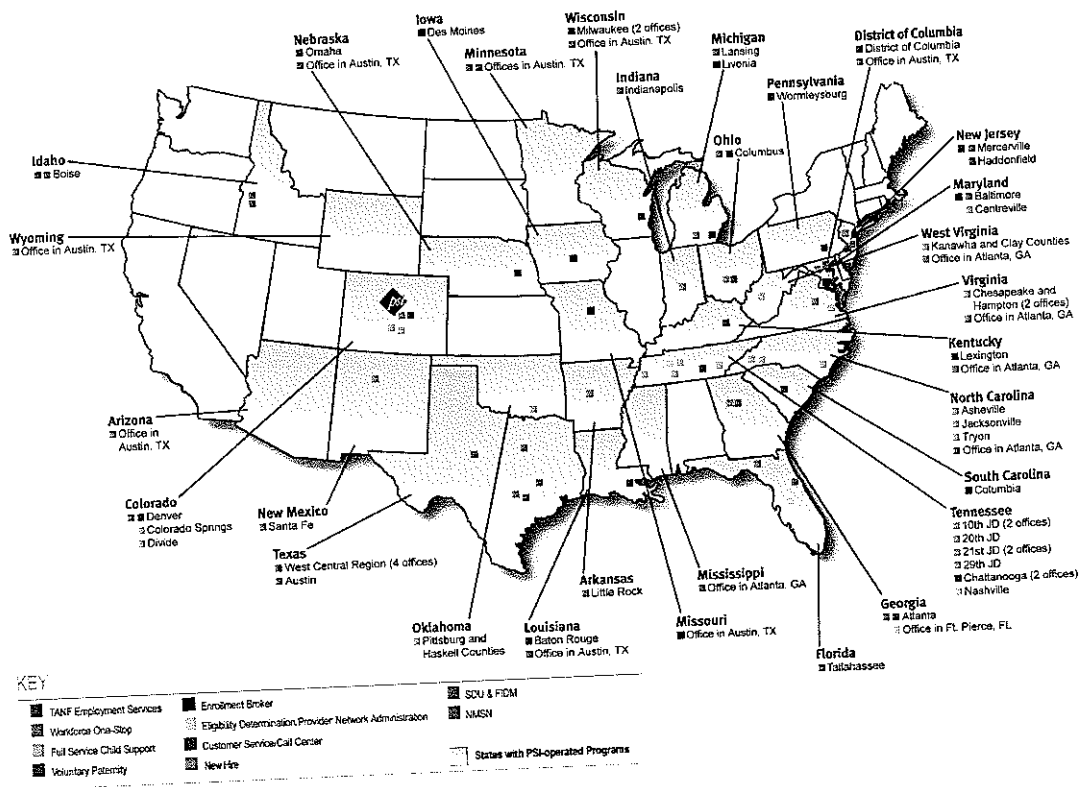


an issue. In the Massachusetts Restaurant Workers Hand Washing Campaign, for example, we interviewed local health inspectors and restaurant managers to add to our focus group research. For the Colorado bioterrorism strategic planning project, we interviewed local public health officials around the state to learn more about the barriers and challenges they faced, in their counties and on a statewide level, to improving their level of overall emergency preparedness.

Project Evaluation

Many of our projects have either involved a separate evaluation component or we have served as an independent evaluator of other health and human service programs. We have conducted process, outcome, and media evaluations using a variety of techniques that include surveys, focus groups, interviews, site visits, database analysis, and media reach and frequency reports.

A truly effective service delivery consultant needs a solid grounding in program operation, in program policy and in technology. PSI has an exceptionally strong background in all three. We have operated continuously for 24 years, growing steadily in size, program expertise, and financial strength. With full-service offices in numerous states, we currently manage a collective child support caseload that is larger than the caseload of 31 states and represents 76 percent of the outsourced caseload nationally. Our full-service operations encompass a diverse set of program environments, working with a wide variety of state child support policies, procedures and automated systems. We also operate numerous government health and workforce programs. A map of our current operations follows:





Service Delivery Analysis Experience

Since 1988, PSI has conducted significant organizational and process assessments for child support and other government agencies in a number of states across the country. These projects are listed in the following table

| Project Name | State | Dates |
|---|-------|------------|
| Management Improvement Study | DE | 9/88-11/88 |
| Child Support Enforcement Program Management Assessment | VT | 5/89-6/90 |
| Study of AFDC and Medicaid Application Processing | NC | 5/91-7/91 |
| Performance Audit | WV | 8/91-1/92 |
| Child Support and Court Management Study | VT | 7/92-10/92 |
| Study of Milwaukee County Judicial System | WI | 1/93-4/94 |
| Court Improvement Project | WI | 2/96-6/98 |
| Dade County Court Strategic Plan | FL | 5/98-6/02 |
| Reengineering of Hennepin County Public Assistance | MN | 5/98-6/98 |
| Enhancing the Hawaii Judiciary | HI | 8/98-6/01 |
| Child Support Management Study | KY | 12/99-6/00 |
| Child Support Enforcement Program Performance Enhancement | CT | 12/99-6/01 |
| Maricopa County Public Defender Management Productivity Improvement | AZ | 2/00-2/02 |
| Child Support Enforcement Program Review | IL | 3/00-9/00 |
| Child Support Program, Policy, and Procedures Consulting | CA | 6/00-2/01 |
| Legal Services Process Improvement | FL | 8/00-12/01 |
| MICSES System Enhanced Performance Assessment Capability | MI | 1/01-12/01 |
| Los Angeles County Performance Improvement Plan | CA | 6/01-9/01 |
| Performance Improvement Plan for Butte, San Bernardino, and Yuma Counties | CA | 9/01-9/02 |
| ACES System Reengineering | NJ | 9/02-9/05 |
| Clark County Family Support Division Organizational Assessment | NV | 3/03-8/03 |
| Gwinnett County Courts Operations and Efficiency Study | GA | 1/04-7/04 |
| Child Support BPR | MA | 8/04-5/05 |
| Las Vegas Court Township Operational and Workload Assessment | NV | 2/05-6/05 |
| King County Superior Court Targeted Operational Master Plan | WA | 11/05-7/06 |
| Income Maintenance Strategic Plan | IA | 4/06-9/06 |
| Child Support BPR | NJ | 1/06-6/07 |

Our experience with strategic planning, as well as organizational and process assessments is both broad and deep. For example, in 2001, PSI conducted an assessment of the Los Angeles County Child Support Program to identify areas of potential improvement in program performance, management, structure, and case processing. With a caseload exceeding 550,000, and a staff of more than 2,000, this is the largest local child support agency in the country. PSI analyzed the adequacy and mix of staffing resources. We assessed the organizational structure to identify means of improving productivity, including the accurate and timely



completion of tasks, the effectiveness of results, and responsiveness to customers. PSI performed an intensive review of service provision in all functional areas: intake, location, establishment, enforcement, review and adjustment, and customer service, with a focus on needed changes in the provision of services that directly affect federal performance measures. PSI also analyzed the management approach to strategic planning, performance monitoring and analysis, training, quality assurance, and continuous improvement.

PSI understands the challenges facing public organizations – including increasing demands for services and accountability while available resources to support mission critical activities level off or decline. The proposed PSI team is highly experienced in assisting public organizations in planning, preparing and responding to these challenges. We are confident that the West Virginia Department of Health and Human Resources (DHHR), Bureau for Children and Families (BCF) will benefit from our planning and human services expertise, resulting in strengthened collaborative relationships and enhanced outcomes for all of those the Bureau serves.

PSI employs a project management methodology based on the practices represented in the *A Guide to the Project Management Body of Knowledge* (PMBOK Guide)¹. We value clear, honest communications with our client partners from the project's initiation in clarifying our understanding about scope and expectations, through project execution, deliverable acceptance and project closure. PSI is very familiar with the concepts and standards of practice - as well as proficient in the tools and techniques – that have been outlined in the comprehensive, step-by-step strategic planning approach authored by Bryson and Alston².

Accordingly, we will work closely with BCF in establishing a detailed project work plan that outlines the tasks, subtasks, product deliveries, timelines and required resources. We will undertake a comprehensive assessment of where the organization is today, producing a highly credible SWOT (or SWOC) analysis and an accounting of internal and external stakeholders – include roles in the planning process that will support the project's success. We will conduct nationwide research on relevant human service policy and practice trends. We will synthesize the results of our organizational assessment, the input from stakeholders, and promising trends to inform the BCF Strategic Planning Team's critical identification and framing of strategic issues. We will in turn facilitate the Team's development and prioritization of appropriate goals and objectives that tackle these strategic issues. We will work diligently with BCF to develop an action-oriented, five year implementation plan and a communications process that minimizes resistance and fosters positive change. We will develop an evaluation methodology and plan to compliment this five-year implementation plan.

¹ Project Management Institute (2004). *A Guide to the Project Management Body of Knowledge* (3rd Edition). Newtown Square, PA: Project Management Institute, Inc.

² Bryson, John M. & Alston, Farnum K. (2005). *Creating and Implementing Your Strategic Plan* (2nd Edition). San Francisco, CA: Jossey-Bass.



While not required, we submit the following preliminary project plan that includes high level project tasks and estimated time-spans for completion.

| ID | Task Name | Duration | Start | Finish | Timeline | | | | | | | | | | | | | | | |
|----|--|----------|--------------|--------------|-------------|-------------|-------------|-------------|-------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|
| | | | | | 4th Quarter | 1st Quarter | 2nd Quarter | 3rd Quarter | 4th Quarter | | | | | | | | | | | |
| | | | | | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | |
| 1 | Work Plan Development | 20 days | Mon 10/6/08 | Fri 10/31/08 | | | | | | | | | | | | | | | | |
| 2 | Compile and review background documents | 10 days | Mon 10/6/08 | Fri 10/17/08 | | | | | | | | | | | | | | | | |
| 3 | Draft Work Plan with BCF Strategic Planning Team | 10 days | Mon 10/13/08 | Fri 10/24/08 | | | | | | | | | | | | | | | | |
| 4 | BCF Strategic Planning Team review/approval | 5 days | Mon 10/27/08 | Fri 10/31/08 | | | | | | | | | | | | | | | | |
| 5 | Monthly Progress Reporting | 240 days | Mon 11/3/08 | Fri 10/2/09 | | | | | | | | | | | | | | | | |
| 6 | Compose and submit monthly progress report | 239 days | Mon 11/3/08 | Thu 10/1/09 | | | | | | | | | | | | | | | | |
| 19 | Conduct monthly Progress Report meeting | 240 days | Mon 11/3/08 | Fri 10/2/09 | | | | | | | | | | | | | | | | |
| 32 | Organizational Assessment | 65 days | Mon 11/3/08 | Fri 1/30/09 | | | | | | | | | | | | | | | | |
| 33 | Survey/facilitate mtgs of stakeholders | 35 days | Mon 11/3/08 | Fri 12/19/08 | | | | | | | | | | | | | | | | |
| 34 | Research program policy and practice trends | 35 days | Mon 11/3/08 | Fri 12/19/08 | | | | | | | | | | | | | | | | |
| 35 | Identify critical success factors | 25 days | Mon 12/8/08 | Fri 1/9/09 | | | | | | | | | | | | | | | | |
| 36 | Identify organizational competencies | 25 days | Mon 12/8/08 | Fri 1/9/09 | | | | | | | | | | | | | | | | |
| 37 | Draft Organizational Assessment (SMCC) | 10 days | Mon 1/5/09 | Fri 1/16/09 | | | | | | | | | | | | | | | | |
| 38 | BCF Strategic Planning Team review/approval | 10 days | Mon 1/19/09 | Fri 1/30/09 | | | | | | | | | | | | | | | | |
| 39 | Strategic Goals and Objectives | 110 days | Mon 2/2/09 | Fri 7/3/09 | | | | | | | | | | | | | | | | |
| 40 | Facilitate identification of strategic issues | 40 days | Mon 2/2/09 | Fri 6/19/09 | | | | | | | | | | | | | | | | |
| 41 | Facilitate BCF Strategic Goals and Objectives | 60 days | Mon 3/30/09 | Fri 6/19/09 | | | | | | | | | | | | | | | | |
| 42 | Document Goals, Objectives and operational issues | 10 days | Mon 6/22/09 | Fri 7/3/09 | | | | | | | | | | | | | | | | |
| 43 | Implementation Plan | 45 days | Mon 7/6/09 | Fri 9/4/09 | | | | | | | | | | | | | | | | |
| 44 | Develop five-year Implementation Plan with BCF staff | 25 days | Mon 7/6/09 | Fri 8/7/09 | | | | | | | | | | | | | | | | |
| 45 | Develop a Communications Process for stakeholders | 15 days | Mon 8/3/09 | Fri 8/21/09 | | | | | | | | | | | | | | | | |
| 46 | BCF review/approval | 10 days | Mon 8/24/09 | Fri 9/4/09 | | | | | | | | | | | | | | | | |
| 47 | Evaluation Methodology and Plan | 30 days | Mon 8/24/09 | Fri 10/2/09 | | | | | | | | | | | | | | | | |
| 48 | Develop and document an evaluation methodology | 20 days | Mon 8/24/09 | Fri 9/18/09 | | | | | | | | | | | | | | | | |
| 49 | BCF review/approval | 10 days | Mon 9/21/09 | Fri 10/2/09 | | | | | | | | | | | | | | | | |

Our proposed team offers a combination of planning, research and human services expertise that exceeds the mandatory qualifications in DHHR/BCF's request for assistance in developing the five-year strategic plan. Our team has the necessary skills and qualifications to facilitate multiple groups and complete the planning and assessment tasks outlined in the RFQ. The experience and energy our team brings to the project will ensure on-schedule project deliverables of the highest quality.

RFQ Requirement: Vendor's project lead must demonstrate a minimum five years of experience in facilitation, training, and leadership coaching, at least two years of which is experience in strategic planning in the public sector (preferred in State government areas working with human services).

PSI's Response: Please see below for a description of the proposed project team. Resumes detailing work history, including references, are enclosed in our response.

Joel Bankes, PSI's proposed project lead, has fifteen years strategic planning experience in the public and non-profit sectors. He has been entrusted with coordinating and facilitating strategic planning groups with executives and managers within all three branches of government, at both State and local levels. Bankes brings considerable project management experience and expertise in human services, organizational development, and change management. Joel Bankes' resume, detailing his relevant experience, is enclosed



RFQ Requirement: Vendor must have at a minimum two additional staff with a minimum one year experience in facilitation, training, and leadership coaching to simultaneously facilitate multiple groups and subgroups and work on the project as required.

PSI's Response:

Savannah Kacey has more than 15 years of facilitation/planning, training, and research experience in human services. She has worked extensively with numerous clients in various public Health and Human Services departments to improve business processes and implement desired changes. Her relevant responsibilities have ranged from facilitating the development of Tribal IV-D (child support) programs to assisting the federal Office of Child Support Enforcement in developing strategic plans for employer outreach. She has considerable experience both in developing and delivering training curricula. Savannah Kacey's resume is enclosed.

Ashley Snyder meets the minimum experience requirement and brings expertise in human services policy, best practice, and data analysis. Snyder's experience includes assisting in the facilitation of courthouse safety and security plans. Her consulting project experience includes two years as a trainer of new employees on State administrative fair hearings procedures, case closure procedures and State mandated regulation procedures for Medicaid Assistance. Snyder collects, manages, and analyzes data from multiple sources for both human service and judicial projects. Ashley Snyder's resume is enclosed.



Performance. Service. Integrity

Resumes



Joel K. Bankes

| |
|----------------------------|
| Project Role |
| Relevant Experience |

Project Lead

Bankes combines his years of strategic planning experience with his expertise in group process and organizational development. He has facilitated and coordinated executive-level strategic planning groups at local, state and national levels. These groups have included agency heads, judges, legislators, local elected officials, and program directors. Bankes understands that the measure of successful planning is not limited to achieving consensus about future direction but must also include the plan's successful implementation.

Work History

Principal Consultant Policy Studies Inc.

2001 - Present

Bankes presently manages a Performance Optimization project in partnership with the New Jersey Office of Child Support Services (OCSS). This project's objectives include development of a statewide strategic "blueprint" as well as action plans for each of 21 counties to implement the strategic initiatives included in that blueprint. Bankes has facilitated planning sessions of the Executive Oversight Board (EOB), the EOB's Advisory Group of internal stakeholders, and leadership teams from each of the 21 counties.

Bankes previously served as Lead Consultant on a Business Process Redesign (BPR) Project in partnership with the Health Care Eligibility and Access Division of the Minnesota Department of Human Services (DHS). This project examined eligibility and enrollment processes for Minnesota Public Health Care Programs.

The project focused on improving administrative efficiency and customer service through the modeling and quantitative assessment of alternative, promising strategic initiatives. Bankes

facilitated decision-making sessions of the Project's steering committee - comprised of DHS and county administrators and public health care program stakeholders

Bankes also previously served as a senior consultant on BPR Project with the Child Support Enforcement Program of the Massachusetts Department of Revenue. He co-facilitated the Program's executive decision-making team, assessed the program using business process mapping and focus groups, and developed a plan to implement those business changes adopted by the executive team

Bankes provided management consulting services to the Michigan Office of Child Support as it transitioned through significant changes in its organizational structure, service delivery and automated systems. These services included:

- Facilitation of strategic and operational planning by the Michigan Child Support Leadership Council
- Organizational assessment and redesign of central office administrative processes



**Executive Director
National Child Support Enforcement
Association (NCSEA) 1996 - 2000**

Bankes managed the national office and the work of the association. He built and maintained effective relationships with child support stakeholders and allied organizations. His primary responsibilities included:

- Providing support to the president, executive committee, board of directors, committee chairs, and the members of the Association
- Coordinating the development, execution, evaluation and revision of NCSEA's strategic plan
- Representing NCSEA in contacts with policy makers and affiliated organizations

During his tenure, NCSEA experienced:

- An increase in the organization's annual product and services revenue from \$650,000 in 1996 to \$1.3 million in 2000
- An increase in annual conference attendance of 50 percent
- The development of a successful program of specialized teleconference training
- The completion of a feasibility study for the certification of child support professionals
- The founding of NCSEA's quarterly magazine, Web site, and Research Clearinghouse

**Director of the Domestic
Relations Division
Administrative Office of the Court
Arizona Supreme Court 1994 - 1996**

Bankes served as lead staff to the State Legislature's Child Support Coordinating Council and Domestic Relations Reform Committee.

Bankes facilitated multiple consensus-based improvements to the child support program and domestic relations processes. In addition:

- Bankes oversaw the successful passage of one of the nation's first mandatory divorce education programs.
- He supervised a quadrennial review and revision of Arizona's Child Support Guidelines
- Bankes developed a Child Support Public Awareness Campaign in collaboration with the Arizona Cardinals of the NFL.
- Bankes provided consultation to local courts on model standards for domestic violence case management, expedited judicial processes and pro-se litigant services

**Director of the Family Support Center
Clerk of the Court
Maricopa County
Superior Court 1989 - 1994**

Bankes supervised Child Support and Domestic Relations Court staff in expedited hearing, child support payment processing, wage withholding, and pro-se service sections. He assisted the court in managing a large caseload of self-represented litigants through forms assistance, child support guidelines calculations, and referral services. Bankes completed intensive training in Management Group Process and coordinated strategic planning for the Clerk's Office of the Superior Court

**Director and Mediator/Custody Evaluator
Maricopa County
Superior Court 1985 - 1989**

Bankes supervised special masters assessing and mediating visitation complaints; developed



community-wide supervised visitation resources;
and provided custody evaluations, mediation, and
family counseling

Education

- ♦ M.S., clinical psychology, Illinois State University
- ♦ B.S., psychology, Honors Research Program, University of Illinois

Professional Activities

- ♦ Member, Association of Business Process Management Professionals (ABPMP)
- ♦ Member, National Child Support Enforcement Association (NCSEA)
- ♦ Past President, AZ Chapter of the Association of Family and Conciliation Courts (AFCC)
- ♦ Past President, AZ Family Support Council

References

Alisha Griffin, Director
New Jersey Dept. of Human Services, Division of
Family Development, Office of Child Support
P.O. Box 716
Trenton, NJ 08625-0716
E-Mail Address: alisha.griffin@dhs.state.nj.us
Phone: 609 584 5093

Stephanie Radtke, Acting Director
Health Care Eligibility and Access
Minnesota Department of Human Services
540 Cedar Street
P.O. Box 64989
St. Paul, MN 55164-0989
E-Mail Address: Stephanie.Radtke@state.mn.us
Phone: 651.431 3255

Marilyn Stephen, Director
Michigan Family Independence Agency
Office of Child Support
PO Box 30478
Lansing, MI 48909-7978
E-Mail Address: stephenm3@michigan.gov
Phone: 517 241 5838



Savannah Kacey

Project Role

Senior Consultant

Relevant Experience

- Kacey brings more than 15 years of human services experience to her position.
- She provides expertise in program planning and development, strategy development, research, facilitation and training.

Work History

Senior Consultant
Policy Studies Inc.

2001 - Present

Kacey provides expertise on child support management and policy development, guidance on data gathering and data analysis, and quality assurance program development. The experience she acquired while working with the OCSE makes her a key team member when evaluating child support strategies, developing manuals, and creating training programs.

Kacey serves as PSI's Director of Tribal Initiatives, a consortium of PSI employees from PSI's Peace and Justice, Health, Technical, and Social Services teams. In this role, she coordinates the relationship between the National Tribal Child Support Association and PSI. She monitors grants, maintains contact with those federal agencies regulating tribal support, and establishes partnerships with other interested stakeholders. She facilitates the development of Tribal IV-D programs, assisting with visioning, planning, implementation and training of new tribal program staff.

Kacey works with numerous clients in various Health and Human Services departments to improve business processes and implement desired changes. In this role she facilitates group

processes, designs implementation strategies and facilitates change management practices.

Senior Training Specialist
Associate

1999 - 2001

1998 - 1999

Center for the Support of Families

As Senior Training Specialist, Kacey worked on the following projects:

- **OCSE, Employer Outreach Project.** As Team Lead, Kacey collaborated with the federal Employer Services Director to plan and implement strategies to provide education and support to employers in the United States and its territories. She organized and managed the work of the Employer Services Team in the development of manuals, videos, training material, brochures, material for workshop presentations and meetings, and other guidance to the employer community.

Kacey worked with fellow team members and OCSE to develop strategic plans for employer outreach. She developed and managed implementation plans, monitored product development, provided scheduling information, edited written material, maintained the unit's historical record, and provided current initiative management. In addition, Kacey provided and maintained a



digest of facts pertinent to Child Support and Employer issues.

- ♦ **OCSE, Employer Services Team.** Kacey served as Project Lead for the SSN Feedback Project, the Employer Participation Project, the Website Redesign Project, and the Native American Initiative. Kacey used her child support knowledge to develop outreach and training material for diverse audiences impacted by the New Hire Reporting system, and she created strategies to encourage participation and compliance with such groups. Kacey identified issues, created plans, developed material, tracked progress of action plans, and reported progress to the Center, SRA, and the OCSE customer.
- ♦ **OCSE, The Employer's Desk Guide to Child Support.** While overseeing all aspects of bringing this project to completion, Kacey provided the client, author, editor, publisher, and the Government Printing Office with task management and communication expertise
- ♦ **OCSE, Trainer.** Kacey designed and delivered training to diverse groups including employers and local child support staff

As an Associate, Kacey worked on the following projects:

- ♦ **Pennsylvania Child Support Enforcement System (PACSES), Trainer.** Kacey delivered a two-week overview course, "Introduction to PACSES," in several counties in Pennsylvania. She also provided intensive on-site support to Lycoming County and Delaware County

during their conversions to the PACSES system.

- ♦ **Academic Services Representative, Pennsylvania Higher Education Assistance Agency (PHEAA), 1996 - 1998.** Kacey resolved student loan problems involving all aspects of PHEAA's services, for Financial Aid Officers at colleges throughout the United States. These complex issues required a thorough working knowledge of each department in the agency and the ability to manage workflow through multiple departments to reach satisfactory and timely conclusions.
- ♦ **Customer Service Representative, Graduate Loan Center Division, Pennsylvania Higher Education Assistance Agency (PHEAA), 1994 - 1996.** Kacey answered incoming calls from graduate students and provided the necessary information to service their loans. She trained new representatives in phone etiquette and loan terms, and trained existing staff in anticipation of the conversion to the COMPASS computer system.

Kacey reviewed call volume and patterns, prepared scripts, and designed flow charts. She worked with an AT&T programmer to develop and test the system and with PHEAA MIS to ensure COMPASS support. In addition, Kacey trained staff on IVR technology.

Kacey developed a new call monitoring system (CMS) that emphasized those areas that were most important to her manager. She trained monitoring staff to use the new tool.



and maintained a database for results. Using CMS, Kacey provided a custom report on monthly phone calls. She developed and administered a tool for representatives that allowed them to evaluate Technical Assistants, supervisors, and managers.

Education

- ♦ B.A., history, Cum Laude, Hiram College
- ♦ Graduate Courses, curriculum design (non-degree), University of Pittsburgh
- ♦ Education Courses leading to nontraditional certification of second-career teachers, Wilson College
- ♦ Transformational Technology courses in coaching and human development, Landmark Education Corporation

References

Rosemary Savedra
Orange County Dept of Child Support Services
1055 N. Main Street
Santa Ana, CA 92701
714.347.8107

Eva White, Chief Justice
Nez Perce Tribal Court
P.O. Box 35
100 Agency Road
Lapwai, ID 83540
208.843.7339

Carol Callahan, Director (retired)
OCSE Employer Services Team
6313 Massachusetts Avenue
Bethesda, MD 20816
301.229.7341



Ashley N. Snyder

Project Role

Consultant Associate

Relevant Experience

- ◆ Snyder provides expertise in policy and data analysis and research in the Human Services and Judicial sector.

Work History

Consultant Associate Policy Studies Inc.

2006 - Present

Snyder collects, manages, and analyzes data for child support, human services and judicial projects. She works with and provides support for senior consultants. Snyder also writes portions of child support project work. Her recent projects include:

- ◆ **Delaware Child Support Business Process Reengineering (BPR).** In an effort to assist the State of Delaware in eventually replacing their existing child support collections system, PSI is conducting a review of all current child support business processes in order to make recommendations for future processes. Snyder assisted in the interviewing of Delaware Child Support workers, and the data collection resulting from those interviews. Currently, Snyder is responsible for continuing data management and support for the Project Manager and Senior Business Consultants.
- ◆ **Hawaii Strength in Families 1115 Grant.** PSI manages an early intervention program for applicants of public assistance, emphasizing the importance of two-parent relationships and paternity establishment. On a weekly basis Snyder collects, organizes and manages data on custodial and non-custodial parents, as

well as provides support for senior researchers in analyzing the results of this data.

- ◆ **Pennsylvania Court Safety.** PSI conducted a series of Court Safety and Security Workshops for the Administrative Office of the Pennsylvania Courts for the third consecutive year. Snyder assisted the Project Manager in facilitating the development of courthouse safety and security plans, as well as how to recognize, plan for and protect against courthouse security threats. Snyder was also responsible for the data management portion of the workshops, including creating customized PowerPoint documents for the client and assisting the Project Manager with various other necessary project tasks.
- ◆ **Virginia Predictive Model.** PSI was involved in developing a software application to predict a Non-Custodial Parent's "arrear risk" on child support payments. Snyder provided troubleshooting for case managers using this tool, and collected and managed the payment data resulting from this tool. Snyder also provided assistance to senior researchers with data analysis and outcomes of the tool. At the end of the project, Snyder was responsible for the reporting and analysis of all data compiled from project start to project completion.



- ◆ **Federal Office of Child Support Enforcement “Parenting Connections” handbook.** PSI developed an informational handbook on basic parenting skills and the importance of establishing a healthy, co-parenting relationship. Snyder assisted the project manager with the research and writing of this handbook for unwed parents.

**Arapahoe District Court –
18th Judicial District, Denver 2006**
Working with the District Court, Snyder completed specific tasks for six assigned projects including a 5-year District-wide file retention and destruction plan. Snyder completed a 5-year Employee Training Tracking plan, and audited Court Appointed Counsel Billings on a daily basis.

**Lead Case Manager
Intake Case Manager
Longterm Care Options 2002 - 2006**
Snyder worked to provide clients with access to long term care, and other community based services to qualifying Medicaid applicants. By conducting face to face interviews and verifying and analyzing functional information, Snyder determined clients’ functional eligibility for the Home and Community Based Services (HCBS) program.

Snyder coordinated State level administrative fair hearings for clients appealing denial of eligibility determinations. She represented Longterm Care Options as the appellee in these administrative fair hearings. Snyder spent over two years training new employees on State level administrative fair hearings procedures, case closure procedures and State mandated regulation procedures for

Medicaid Assistance, called Volume 8 regulations. She provided direct supervision and assistance to case managers while in the Lead Case Manager position. Snyder worked closely with the Colorado Department of Human Services regarding financial approvals.

**Family Support Specialist
Cedars Youth Services 2002**
Snyder helped youth, adults, and families in their homes and in the community to achieve specific, short and long term goals outlined by therapists and court orders

Education

- ◆ MS, legal administration, University of Denver Sturm College of Law
- ◆ BA, psychology and sociology, University of Nebraska

Knowledge, Skills and Abilities

- ◆ Snyder continues to provide administrative assistance to consultants and managers on an as needed basis. Snyder also participates in proposal writing and the continued maintenance of computer skills using software programs such as SPSS and Inquisite, as well as Microsoft package programs Visio and Excel.

References

Kyle Ramberger
Commonwealth of Pennsylvania
Administrative Office of Pennsylvania Courts
E-Mail Address: Kyle.Ramberger@pacourts.us
Phone: 717.795 2000, extension 4089



Performance Service Integrity

Required Forms and Addendum #1



State of West Virginia
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PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION TO:
 ROBERTA WAGNER
 304-558-0067

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Policy Studies Inc.
 1899 Wynkoop Street
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 Denver, CO 80202

HEALTH AND HUMAN RESOURCES
 BCF - COMMISSIONER'S OFFICE
 350 CAPITOL STREET, ROOM 730
 CHARLESTON, WV
 25301-3711 304-558-4682

| DATE PRINTED | TERMS OF SALE | SHIP VIA | F.O.B. | FREIGHT TERMS |
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| 08/06/2008 | | | | |

BID OPENING DATE: 09/04/2008 BID OPENING TIME 01:30PM

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| OPEN-END BLANKET CONTRACT PROFESSIONAL SERV. TO ASSIST IN DEVEL. OF STRATEGIC TO PROVIDE PROFESSIONAL SERVICES TO ASSIST IN THE DEVELOPMENT OF A FIVE YEAR STRATEGIC PLAN AND THE ESTABLISHMENT OF AN EFFECTIVE ORGANIZATIONAL VISION FOR THE FUTURE FOR THE BUREAU FOR CHILDREN AND FAMILIES PER THE ATTACHED SPECIFICATIONS. TERM OF THE AGREEMENT SHALL BE UPON AWARD AND CONTINUE FOR A PERIOD OF ONE YEAR, WITH THE OPTIONS OF (2) TWO, (1) ONE YEAR RENEWALS. EXHIBIT 3 LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE ON UPON AWARD AND EXTENDS FOR A PERIOD OF ONE (1) YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE ORIGINAL CONTRACT. THE "REASONABLE TIME" PERIOD SHALL | | | | | | |

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

| | | | |
|-------------------------------|---------------------|-----------------------------------|-------------------------|
| SIGNATURE <i>Mark Levy</i> | Mark Levy | TELEPHONE 303-863-0900 | DATE August 29, 2008 |
| TITLE President | FEIN 84-093-8521 | ADDRESS CHANGES TO BE NOTED ABOVE | |

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2

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| | | | | | | |
| <p>NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS WRITTEN NOTICE.</p> <p>UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT, THE TERMS, CONDITIONS AND PRICING SET HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT.</p> <p>RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR, SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30) DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS.</p> <p>CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.</p> <p>OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)</p> <p>QUANTITIES: QUANTITIES LISTED IN THE REQUISITION ARE APPROXIMATIONS ONLY, BASED ON ESTIMATES SUPPLIED BY THE STATE SPENDING UNIT. IT IS UNDERSTOOD AND AGREED</p> | | | | | | |

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| SIGNATURE | Mark Levy | TELEPHONE 303-863-0900 | DATE August 29, 2008 |
| TITLE President | FEN 84-093-8521 | ADDRESS CHANGES TO BE NOTED ABOVE | |

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 Vendor Policy Studies Inc.
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| <p>THAT THE CONTRACT SHALL COVER THE QUANTITIES ACTUALLY ORDERED FOR DELIVERY DURING THE TERM OF THE CONTRACT, WHETHER MORE OR LESS THAN THE QUANTITIES SHOWN.</p> <p>ORDERING PROCEDURE: SPENDING UNIT(S) SHALL ISSUE A WRITTEN STATE CONTRACT ORDER (FORM NUMBER WV-39) TO THE VENDOR FOR COMMODITIES COVERED BY THIS CONTRACT. THE ORIGINAL COPY OF THE WV-39 SHALL BE MAILED TO THE VENDOR AS AUTHORIZATION FOR SHIPMENT, A SECOND COPY MAILED TO THE PURCHASING DIVISION, AND A THIRD COPY RETAINED BY THE SPENDING UNIT.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THIS CONTRACT IS AUTOMATICALLY NULL AND VOID, AND IS TERMINATED WITHOUT FURTHER ORDER.</p> <p>THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY ELECTRONIC MEDIUM SUCH AS CD-ROM.</p> <p>REV. 04/11/2001</p> <p>INQUIRIES: WRITTEN QUESTIONS SHALL BE ACCEPTED THROUGH CLOSE OF BUSINESS ON 8/19/08. QUESTIONS MAY BE SENT VIA USPS, FAX, COURIER OR E-MAIL. IN ORDER TO ASSURE NO VENDOR RECEIVES AN UNFAIR ADVANTAGE, NO SUBSTANTIVE QUESTIONS WILL BE ANSWERED ORALLY. IF POSSIBLE, E-MAIL QUESTIONS ARE PREFERRED. ADDRESS INQUIRIES TO: ROBERTA WAGNER DEPARTMENT OF ADMINISTRATION</p> | | | | | | |

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 4

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| PURCHASING DIVISION 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25311 FAX: 304-558-4115 E-MAIL: ROBERTA.A.WAGNER@WV.GOV | | | | | | |
| PURCHASING CARD ACCEPTANCE: THE STATE OF WEST VIRGINIA CURRENTLY UTILIZES A VISA PURCHASING CARD PROGRAM WHICH IS ISSUED THROUGH A BANK. THE SUCCESSFUL VENDOR MUST ACCEPT THE STATE OF WEST VIRGINIA VISA PURCHASING CARD FOR PAYMENT OF ALL ORDERS PLACED BY ANY STATE AGENCY AS A CONDITION OF AWARD. | | | | | | |
| VENDOR PREFERENCE CERTIFICATE | | | | | | |
| CERTIFICATION AND APPLICATION* IS HEREBY MADE FOR PREFERENCE IN ACCORDANCE WITH WEST VIRGINIA CODE, 5A-3-37 (DOES NOT APPLY TO CONSTRUCTION CONTRACTS) . | | | | | | |
| A. APPLICATION IS MADE FOR 2.5% PREFERENCE FOR THE REASON CHECKED: | | | | | | |
| <input type="checkbox"/> BIDDER IS AN INDIVIDUAL RESIDENT VENDOR AND HAS RESIDED CONTINUOUSLY IN WEST VIRGINIA FOR FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION; OR | | | | | | |
| <input type="checkbox"/> BIDDER IS A PARTNERSHIP, ASSOCIATION OR CORPORATION RESIDENT VENDOR AND HAS MAINTAINED ITS HEAD-QUARTERS OR PRINCIPAL PLACE OF BUSINESS CONTINUOUSLY IN WEST VIRGINIA FOR FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION; OR 80% OF THE OWNERSHIP INTEREST OF BIDDER IS HELD BY ANOTHER INDIVIDUAL, PARTNERSHIP, ASSOCIATION OR CORPORATION RESIDENT VENDO | | | | | | |

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| SIGNATURE | Mark Levy | TELEPHONE 303-863-0900 | DATE August 29, 2008 |
| TITLE President | EIN 84-093-8521 | ADDRESS CHANGES TO BE NOTED ABOVE | |

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| <p>WHO HAS MAINTAINED ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS CONTINUOUSLY IN WEST VIRGINIA FOR FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION; OR</p> <p>() BIDDER IS A CORPORATION NONRESIDENT VENDOR WHICH HAS AN AFFILIATE OR SUBSIDIARY WHICH EMPLOYS A MINIMUM OF ONE HUNDRED STATE RESIDENTS AND WHICH HAS MAINTAINED ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS WITHIN WEST VIRGINIA CONTINUOUSLY FOR THE FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION.</p> <p>B. APPLICATION IS MADE FOR 2.5% PREFERENCE FOR THE REASON CHECKED:</p> <p>() BIDDER IS A RESIDENT VENDOR WHO CERTIFIES THAT, DURING THE LIFE OF THE CONTRACT, ON AVERAGE AT LEAST 75% OF THE EMPLOYEES WORKING ON THE PROJECT BEING BID ARE RESIDENTS OF WEST VIRGINIA WHO HAVE RESIDED IN THE STATE CONTINUOUSLY FOR THE TWO YEARS IMMEDIATELY PRECEDING SUBMISSION OF THIS BID;</p> <p>OR</p> <p>() BIDDER IS A NONRESIDENT VENDOR EMPLOYING A MINIMUM OF ONE HUNDRED STATE RESIDENTS OR IS A NONRESIDENT VENDOR WITH AN AFFILIATE OR SUBSIDIARY WHICH MAINTAINS ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS WITHIN WEST VIRGINIA EMPLOYING A MINIMUM OF ONE HUNDRED STATE RESIDENTS WHO CERTIFIES THAT, DURING THE LIFE OF THE CONTRACT, ON AVERAGE AT LEAST 75% OF THE EMPLOYEES OR BIDDERS' AFFILIATE'S OR SUBSIDIARY'S EMPLOYEES ARE RESIDENTS OF WEST VIRGINIA WHO HAVE RESIDED IN THE STATE CONTINUOUSLY FOR THE TWO YEARS IMMEDIATELY PRECEDING SUBMISSION OF THIS BID.</p> <p>BIDDER UNDERSTANDS IF THE SECRETARY OF TAX & REVENUE</p> | | | | | | |

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| SIGNATURE | Mark Levy | TELEPHONE 303-863-0900 | DATE August 29, 2008 |
| TITLE President | FAX 84-093-8521 | ADDRESS CHANGES TO BE NOTED ABOVE | |

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 6

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| <p>DETERMINES THAT A BIDDER RECEIVING PREFERENCE HAS FAILED TO CONTINUE TO MEET THE REQUIREMENTS FOR SUCH PREFERENCE, THE SECRETARY MAY ORDER THE DIRECTOR OF PURCHASING TO: (A) RESCIND THE CONTRACT OR PURCHASE ORDER ISSUED; OR (B) ASSESS A PENALTY AGAINST SUCH BIDDER IN AN AMOUNT NOT TO EXCEED 5% OF THE BID AMOUNT AND THAT SUCH PENALTY WILL BE PAID TO THE CONTRACTING AGENCY OR DEDUCTED FROM ANY UNPAID BALANCE ON THE CONTRACT OR PURCHASE ORDER.</p> <p>BY SUBMISSION OF THIS CERTIFICATE, BIDDER AGREES TO DISCLOSE ANY REASONABLY REQUESTED INFORMATION TO THE PURCHASING DIVISION AND AUTHORIZES THE DEPARTMENT OF TAX AND REVENUE TO DISCLOSE TO THE DIRECTOR OF PURCHASING APPROPRIATE INFORMATION VERIFYING THAT BIDDER HAS PAID THE REQUIRED BUSINESS TAXES, PROVIDED THAT SUCH INFORMATION DOES NOT CONTAIN THE AMOUNTS OF TAXES PAID NOR ANY OTHER INFORMATION DEEMED BY THE TAX COMMISSIONER TO BE CONFIDENTIAL.</p> <p>UNDER PENALTY OF LAW FOR FALSE SWEARING (WEST VIRGINIA CODE 61-5-3), BIDDER HEREBY CERTIFIES THAT THIS CERTIFICATE IS TRUE AND ACCURATE IN ALL RESPECTS; AND THAT IF A CONTRACT IS ISSUED TO BIDDER AND IF ANYTHING CONTAINED WITHIN THIS CERTIFICATE CHANGES DURING THE TERM OF THE CONTRACT, BIDDER WILL NOTIFY THE PURCHASING DIVISION IN WRITING IMMEDIATELY.</p> <p>BIDDER: Policy Studies Inc.</p> <p>DATE: August 29, 2008</p> <p>SIGNED: </p> | | | | | | |

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| SIGNATURE | Mark Levy | TELEPHONE 303-863-0900 | DATE August 29, 2008 |
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 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
 BCF90050

PAGE
 7

ADDRESS CORRESPONDENCE TO ATTENTION OF
 ROBERTA WAGNER
 304-558-0067

RFQ COPY

TYPE NAME/ADDRESS HERE

Policy Studies Inc.
 1899 Wynkoop Street
 Suite 300
 Denver, CO 80202

HEALTH AND HUMAN RESOURCES
 BCF - COMMISSIONER'S OFFICE
 350 CAPITOL STREET, ROOM 730
 CHARLESTON, WV
 25301-3711 304-558-4682

| DATE PRINTED | TERMS OF SALE | SHIP VIA | FOB. | FREIGHT TERMS |
|--------------|---------------|----------|------|---------------|
| 08/06/2008 | | | | |

BID OPENING DATE: 09/04/2008 BID OPENING TIME 01:30PM

| LINE | QUANTITY | UQP | CAT NO | ITEM NUMBER | UNIT PRICE | AMOUNT |
|---|----------|-----|--------|------------------|------------|--------|
| | | | | | | |
| | | | | TITLE: President | | |
| <p>* CHECK ANY COMBINATION OF PREFERENCE CONSIDERATION(S) IN EITHER "A" OR "B", OR BOTH "A" AND "B" WHICH YOU ARE ENTITLED TO RECEIVE. YOU MAY REQUEST UP TO THE MAXIMUM 5% PREFERENCE FOR BOTH "A" AND "B". (REV. 12/00)</p> <p>NOTICE</p> <p>A SIGNED BID MUST BE SUBMITTED TO:</p> <p>DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130</p> <p>PLEASE NOTE: A CONVENIENCE COPY WOULD BE APPRECIATED.</p> <p>THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:</p> <p>SEALED BID</p> <p>BUYER: ROBERTA WAGNER/FILE 22</p> <p>RFQ NO.: BCF90050</p> <p>BID OPENING DATE: 9/4/2008</p> <p>BID OPENING TIME: 1:30 PM</p> | | | | | | |

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE *Mark Levy* Mark Levy TELEPHONE 303-863-0900 DATE August 29, 2008
 TITLE President FEIN 84-093-8521 ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



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 Department of Administration
 Purchasing Division
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|---|----------|-----|--------|-------------|------------|--------|
| PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID: 303-295-0244 ----- CONTACT PERSON (PLEASE PRINT CLEARLY): Brian Shea ----- ***** THIS IS THE END OF RFQ BCF90050 ***** TOTAL: <u>\$98,273</u> | | | | | | |

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| | | | |
|--------------------|---------------------|-----------------------------------|-------------------------|
| SIGNATURE | Mark Levy | TELEPHONE 303-863-0900 | DATE August 29, 2008 |
| TITLE President | FEIN 84-093-8521 | ADDRESS CHANGES TO BE NOTED ABOVE | |

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| 08/20/2008 | | | | |

BID OPENING DATE: 09/04/2008 BID OPENING TIME 01:30PM

| LINE | QUANTITY | UOP | CAT. NO. | ITEM NUMBER | UNIT PRICE | AMOUNT |
|--|----------|-----|----------|-------------|------------|--------|
| ADDENDUM NO. 1 1. QUESTIONS AND ANSWERS ATTACHED. 2. ADDENDUM ACKNOWLEDGEMENT IS ATTACHED. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN DISQUALIFICATION OF YOUR BID. EXHIBIT 10 REQUISITION NO.: BCF90050 ADDENDUM ACKNOWLEDGEMENT I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC. ADDENDUM NO. S: NO. 1 <input checked="" type="checkbox"/> NO. 2 NO. 3 NO. 4 NO. 5 I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS. | | | | | | |

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

| | | | |
|-------------------------------|---------------------|-----------------------------------|-------------------------|
| SIGNATURE <i>Mark Levy</i> | Mark Levy | TELEPHONE 303-863-0900 | DATE August 29, 2008 |
| TITLE President | FEIN 84-093-8521 | ADDRESS CHANGES TO BE NOTED ABOVE | |

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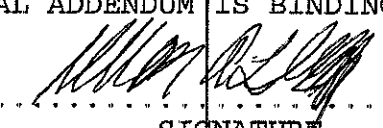
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| <p>VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.</p> <p style="text-align: center;">  SIGNATURE Policy Studies Inc. COMPANY August 29, 2008 DATE </p> <p>REV. 11/96</p> <p style="text-align: center;">END OF ADDENDUM NO. 1</p> | | | | | | |

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| | | | |
|---|------------------|-----------------------------------|----------------------|
| SIGNATURE  | Mark Levy | TELEPHONE 303-863-0900 | DATE August 29, 2008 |
| TITLE President | FEIN 84-093-8521 | ADDRESS CHANGES TO BE NOTED ABOVE | |

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|---|----------|-----|--------|-------------|------------|----------|
| 0001 | 1 | JB | | 961-20 | | |
| PROFESSIONAL SERV. TO ASSIST IN DEVEL. OF STRATEGIC | | | | | | |
| ***** THIS IS THE END OF RFQ BCF90050 ***** TOTAL: | | | | | | \$98,273 |

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SIGNATURE *Mark Levy* Mark Levy TELEPHONE 303-863-0900 DATE August 29, 2008
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STATE OF WEST VIRGINIA
Purchasing Division**PURCHASING AFFIDAVIT****VENDOR OWING A DEBT TO THE STATE:**

West Virginia Code §5A-3-10a provides that: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

PUBLIC IMPROVEMENT CONTRACTS & DRUG-FREE WORKPLACE ACT:

West Virginia Code §21-1D-5 provides that: Any solicitation for a public improvement construction contract shall require each vendor that submits a bid for the work to submit at the same time an affidavit that the vendor has a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the West Virginia Code. A public improvement construction contract may not be awarded to a vendor who does not have a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the West Virginia Code and who has not submitted that plan to the appropriate contracting authority in timely fashion. For a vendor who is a subcontractor, compliance with Section 5, Article 1D, Chapter 21 of the West Virginia Code may take place before their work on the public improvement is begun.

ANTITRUST:

In submitting a bid to any agency for the state of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the state of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the state of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the state of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership or person or entity submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

LICENSING:

Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

CONFIDENTIALITY:

The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. Vendors should visit www.state.wv.us/admin/purchase/privacy for the Notice of Agency Confidentiality Policies.

Under penalty of law for false swearing (West Virginia Code §61-5-3), it is hereby certified that the vendor acknowledges the information in this said affidavit and is in compliance with the requirements as stated.

Vendor's Name: Policy Studies Inc.

Authorized Signature: _____

Date: August 29, 2008



Performance Service Integrity

Vendor Bid Summary Sheet

Vendor Bid Summary Sheet

| Task | Estimated Hours | Vendors Bid Per Hour (inclusive of all travel and expenses) | Extended Costs Per Task (Estimated Hours X Vendor's Bid Per Hour) |
|-----------------------------------|-----------------|--|--|
| #1 Work Plan Development | 40 | \$140 | \$5,609 |
| #2 Meeting Facilitation | 208 | \$162 | \$33,752 |
| #3 Monthly Progress Reporting | 96 | \$91 | \$8,724 |
| #4 Organizational Assessment | 180 | \$132 | \$23,718 |
| #5 Strategic Goals and Objectives | 100 | \$162 | \$16,177 |
| #6 Implementation Plan | 60 | \$129 | \$7,760 |
| #7 Evaluation Methodology | 20 | \$127 | \$2,533 |
| Total Est. Hours → | 704 | Grand Total → | \$98,273 |

Vendors must bid all tasks listed above. Vendor must provide documentation supporting the meeting of all Mandatory Qualifications as listed.

Vendor Signature: 

Date: 8-29-08

“NOTE: The hours are estimated only. Vendor will be paid actual hours worked, whether they be greater or less than estimate.”