RFQ BCF11006 Commission to Study ::: Residential Placement of Children

June 29, 2010

Presented to:

Health and Human Resources BCF – Commissioner's Office 350 Capitol Street, Room 730 Charleston, WV 25301-3711

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WV PURCHASING DIVISION

Presented by:

The Center for Entrepreneurial Studies and Development, Inc.
West Virginia University
1062 Maple Drive, Suite B
Morgantown, WV 26505
(304) 293-5551

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. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
- 4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, 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.
- 5. Payment may only be made after the delivery and acceptance of goods or services.
- 6. Interest may be paid for late payment in accordance with the West Virginia Code.
- 7. Vendor preference will be granted upon written request in accordance with the West Virginia Code.
- 8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
- 9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
- 10. The laws of the State of West Virginia and the Legislative Rules of the Purchasing Division shall govern the purchasing process.
- 11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
- 12. BANKRUPTCY: In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
- 13. HIPAA BUSINESS ASSOCIATE ADDENDUM: The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at www.state.wv.us/admin/purchase/vrc/hipaa.htm and is hereby made part of the agreement. Provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
- 14. 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. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf.
- 15. 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, and the West Virginia Insurance Commission. 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.
- 16. 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 material, 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.

INSTRUCTIONS TO BIDDERS

- 1. Use the quotation forms provided by the Purchasing Division. Complete all sections of the quotation form.
- 2. 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. Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
- 4. 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
- 5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).

THE CENTER FOR ENTREPRENEURIAL STUDIES AND DEVELOPMENT, INC. (CESD) RESPONSE TO STATE OF WEST VIRGINIA RFQ #BCF11006

Background:

The Commission to Study Residential Placement of Children (the Commission) was established by legislative code (H.B. 2334) in 2005 and was reconstituted (S.B. 636) in 2010. The legislation mandated the Commission to study strategies and methods to reduce the number of children presently placed out-of-state, a system of care approach, barriers in developing needed services and how to fund these services, and other special issues and activities that were already being implemented in West Virginia that focused on certification issues regarding facilities. This continues to be the focus of the Commission.

The Bureau for Children and Families is seeking bids for the delivery of professional consultation, technical assistance, planning, facilitation, and report preparation services to assist with the work of the Commission. The selected vendor must be able to provide up to 175 hours of the following services/activities to the Commission.

- Provide consultation, technical assistance and meeting planning.
- Assist with the development of an agenda that address the needs of the group.
- Help prepare clear, concise, meaningful and achievable goals for planning sessions.
- Develop visual and analytical models.
- · Provide phone/email consultation.
- Attend regular quarterly meetings and special meetings.
- Facilitate meetings to keep the group "on task", "on target", and "on time".
- Recommend different approaches that can save time or produce better results.
- Document, review and distribute meeting results.
- Develop strategies for recommendations and implementation plans resulting from meetings.
- Develop post-session reports identifying actions items for implementation.
- Develop annual progress report.

The Center for Entrepreneurial Studies and Development, Inc. (CESD), a West Virginia nonprofit organization, has over 25 years of professional consultation, technical assistance, planning, facilitation, and report preparation experience working with numerous organizations, both public and private, in West Virginia. CESD is registered vendor of the State of West Virginia (ID 709051207) and accepts the State of West Virginia VISA purchasing card for payment of invoices.

Documentation of Qualifications:

CESD, under the project leadership of Dr. Carl Hadsell, has been engaged in a number of collaborative efforts that bring together numerous, diverse organizations all working toward improving the outcomes for West Virginia citizens, be it children or seniors. Examples of this work for public agencies include the Department of Education's Task Force on Out-of-Home Education and the Department of Health and Human Resources' Commission to Study the Residential Placement of Children and the Comprehensive Behavioral Health Commission. With over seven years of extensive work with Vision Shared, CESD assisted more than 500 state-wide volunteers involved in a myriad of projects, some of which addressed children issues. Throughout these efforts CESD strived to connect a number of different groups together and productively facilitate the necessary discussions and improvement actions.

From CESD's project experiences, it has gained a strong understanding of state government operations and an appreciation of how nonprofit organizations, such as some of the providers of children's services, contribute to successful outcomes in Commission work. CESD also brings practical expertise in team development and project

management from its private industry engagements to its Commission work. In the majority of these engagements, CESD has uses consistent planning principles and practices, effective meeting habits and team management materials that it has developed over its more than 25 years of experience. Action plans, after meeting action registers and ongoing progress reports are just a few tools that CESD uses to help organizations effectively complete the actions and achieve the goals outlined in their plans.

CESD strongly believes in accountability, or measuring and communicating progress toward agreed upon actions and goals. In the majority of its work, CESD uses various performance measurement and analytical tools to benchmark progress. Again, CESD's experience in private industry helps in applying process improvement to its work with Commissions. CESD also has extensive work in shaping and writing a variety of reports and documenting processes, including significant design work in large group processes. The covers of a sampling of the reports CESD has been responsible for producing, including a recent Performance Measures Report for Vision Shared, are included in this proposal package. Full copies are available upon request. CESD has also helped in the design, development and maintenance of web sites in support of Commission communication work.

The project team includes Dr. Carl Hadsell (project manager), Matt West, and Holly Clark. The bio sketches of each team member are attached (See Attachment 1).

The following table lists specific projects and references that reflect CESD's experience in consultation, technical assistance, planning and facilitating meetings, developing strategies and implementation plans for group recommendations and report preparation. In some cases, the key reference has moved to another position, but each has a contact person who should be able to speak to what CESD performed on the project. Copies of degrees for the project lead are enclosed.

	Indication of W	here Mandatory Requirements/			
Position	Qualifications Can be Found				
Master in Business	Holly Clark	Master of Science, Industrial Engineering			
Administration, Human Services					
(Social Work, Psychology, or	Carl Hadsell	Master of Business Administration,			
Criminal Justice).		Doctorate of Education, Business			
		Administration			
	 Matt West	Master of Business Administration			
Five years experience in	MVB Bank	Analysis, new organization structure,			
consultation, technical	Larry Mazza	including job descriptions and roles and			
assistance, planning and	CEO	responsibilities. (2007 – 2010)			
facilitating meetings, developing	Petroleum Development	Analysis, new organization structure,			
strategies and implementation	Corporation (PDC)	including job descriptions and roles and			
plans for group	John DeLawder	responsibilities, and leadership training			
recommendations and report	VP HR/Administration	activities. (2005 – 2010)			
preparation for public agencies.	Department of Health &	Leadership development program design			
, , , , ,	Human Resources	and delivery of training. (2005 - 2009)			
	Martha Y. Walker	,			
	Secretary (former)				
	Office Institutional	Facilitation of Out of Home Care Education			
	Education Programs	Task Force. (2004 – 2006)			
	Frank Andrews				
	Superintendent (retired)				
	Comprehensive Behavioral	Analysis, planning and facilitation for			
	Health Commission	Comprehensive Behavioral Health			
	Vicki Jones	Commission. (2007 -2010)			
	Commissioner				
	Lewis County Economic	Provided technical assistance and facilitation			
	Development Authority	of meetings to assist with their strategic			
	Doug Parsons	planning. (2008 – 2010)			
	Executive Director				
	Toothman Rice, PLLC	Analysis, new organization structure,			
	Tom Aman	including job descriptions and roles and			
	Managing Member	responsibilities, and leadership training			
		activities. (2005 – current)			
	Vision Shared	Assisted more than 500 state-wide			
	Scott Rotruck	volunteers involved in a myriad of projects.			
	Chairman (former)	(2002 – 2010)			
	Commission for Residential	Organizational development of Commission			
	Placement	workplace and report. (2005 – 2010)			
	Sue Hage				
	Assistant Commissioner	Designed developed and facilitated			
	WV System of Care Linda Watts	Designed, developed and facilitated Community Forums Best Practices. (2009 –			
	Director	2010)			
		Provided technical assistance and facilitation			
	Barbour County	of meetings to assist with their strategic			
	Development Authority Lisa Sharp	planning. (2009 – 2010)			
	Executive Director	Pidititilg. (2005 - 2010)			
	LACCULIVE DIRECTOR				

Three of five years experience within the areas of child welfare, juvenile justice, education and behavioral health, preferably in West Virginia.	Commission for the Study of the Residential Placement of Children Sue Hage Assistant Commissioner	Organizational development of Commission workplace and report. (2005 – 2010)
	Department of Health & Human Resources Martha Y. Walker Secretary (former)	Leadership development program design and delivery of training. (2005 - 2009)
1	Office Institutional Education Programs Frank Andrews Superintendent (retired)	Facilitation of Out of Home Care Education Task Force. (2004 – 2006)
	Comprehensive Behavioral Health Commission Vicki Jones Commissioner	Analysis, planning and facilitation for Comprehensive Behavioral Health Commission (2007 -2010)
	Vision Shared Scott Rotruck Chairman (former)	Assisted more than 500 state-wide volunteers involved in a myriad of projects. (2002 – 2010)
	WV System of Care Linda Watts Director	Designed, developed and facilitated Community Forums Best Practices. (2009 – 2010)

Vendor Bid Summary Sheet:

Estimated # of hours annually:
175 hours services/All inclusive Hourly Rate: \$130.00 Annual Cost \$22,750.00
Vendor Signature:
Date: 6 69.10



Holly K. Clark Professional Associate

Experience

- Over two years of experience
- Has worked with organizations in government, manufacturing, service, and higher education

Education/Training

•	MSIE	West Virginia University	1999
•	BSIE	West Virginia University	1996
•	Diploma of I	Digital Design, Art Institute of Pittsburgh	2000

· Registered Engineer Intern, State of West Virginia

Areas of Emphasis

- Employee involvement
- Workforce development
- Training technologies
- · Market assessment and business development
- Web and graphic design

Anticipated Role

- · Small project management
- Facilitation
- Research

Representative Project Experience

- Developed structured job training manuals for a CNC machine shop and a motor assembly company
- Performed time studies and developed structured job training manuals for a construction equipment manufacturer
- Facilitated a train-the-trainer session with employees from a chemical manufacturer
- Instructed WVU's Career Success Academy classes
- Facilitated team-building training with WVU's student government leaders
- Delivered a workshop regarding workplace skills to the Mercer County Four-H Camp
- Assisted in the development of a data collection survey and database that is used to gather information regarding West Virginia's workforce development needs
- Coordinated a workforce development project involving nearly 300 employers
- · Assisted with design, modification, and implementation of survey instruments used in a variety of assessments
- Assisted with feasibility studies, market analysis, competitive analysis, and interpretation of survey results
- Created relational databases (including writing specialized queries) for the Career Success Academy, West Virginia Division of Natural Resources, and the West Virginia Education Alliance
- Serve as webmaster for CESD's online offerings

Dr. Carl D. Hadsell Managing Director

Experience

- Over 30 years of experience
- Has worked with over 100 organizations in manufacturing, energy, healthcare, retail, service, government, education (all levels), and the non-profit sector

Education/Training

MBA, 1970 EdD, 1982 West Virginia University

Areas of Emphasis

- · Organizational development and effectiveness
- Strategic planning and business/marketing development planning
- Leadership development (coaching, mentoring)
- Employee involvement and teaming processes
- Understanding customer requirements
- Continuous quality improvement initiatives
- Human resources training and development
- Integrated product development/concurrent engineering
- Market research and analysis, feasibility studies (other research studies)
- Performance metrics
- Professional facilitation

Anticipated Role

- · Project oversight and management
- Research
- Facilitation

Representative Project Experience

- Worked with organizations, through a leadership or management team, to complete enterprise-wide strategic planning and organizational development initiatives
- Implemented total quality management and employee involvement processes in over a dozen organizations from manufacturing organizations to a law firm
- Provided technical assistance to a number of enterprises related to organizational development and business model issues, including appropriate internal and/or external assessments, leadership development, and process analysis
- Provided design assistance and facilitated delivery of "all hands" visioning and strategic planning sessions for organizations, public and not-for-profit
- Served as prime project manager/lead researcher for major study projects (e.g., efficiency in the court system, identification of skills required for West Virginia's future workforce and college-bound populations, effective principal leadership, manufacturing housing industry)
- Supported through technical assistance and facilitation a number of special government Commissions and Task Forces on a myriad of topics to include development of final reports and presentations material
- · Completed program organization effectiveness assessment initiatives for both public and non-profit entities
- Conducted market research and business strategic planning for businesses seeking expansion or enhanced operations
- Assisted a number of state agencies in implementing continuous quality improvement in state government, offering leadership training and working through organizational development and working relationship issues
- Created materials and taught courses in facilitation to include advanced coaching principles and practices
- Provided strategic planning support for Glenville State College

Matt West Professional Associate

Experience

 Over eight years of operations, marketing and project management experience with over 30 organizations in manufacturing, service, technology, higher education and government

Education/Training/Certifications

•	MBA	Duke University, The Fuqua School of Business	2007
•	BSIE	West Virginia University	2002
•	Operations	Management Leadership Program, General Electric	2004

- Six Sigma Green Belt, General Electric
- Registered Engineer Intern, State of West Virginia

Areas of Emphasis

- Continuous improvement initiatives (Lean, Six Sigma, TQM)
- Operations and supply chain management
- Industrial engineering
- · Strategic planning
- Performance management and metrics

Anticipated Role

- · Small project management
- Facilitation
- Research

Representative Project and Leadership Experience

- Implemented Lean Manufacturing for national and international businesses in both discrete and continuous manufacturing settings
- Performed process re-engineering project to analyze and implement an improved packaging and shipping operation for large multi-national company and its subsidiaries
- Performed outsourcing risk analysis for national network of small service businesses
- Developed numerous inventory, production, and capacity planning tools for manufacturing and service organizations
- Assisted design, testing, and implementation of multiple automation processes for a materials business
- Designed and implemented continuous improvement program for international manufacturing organization
- Developed ergonomics program, including training and compliance assessment, for small organizations
- Performed customer needs assessment for large and small manufacturing, service, and government organizations
- Conducted market and industry research to assist organizations in formulating and assessing supply chain strategy
- Designed decision support systems for organizations to streamline repetitive tasks and improve data accuracy
- Developed and delivered technical training for multiple organizations and industries
- Provided supply chain leadership for \$30 MM product line in international location
- Supervised 30+ hourly employees on \$100 MM product line
- Guest speaker at Duke University, West Virginia University, and Central European University on Six Sigma and Organizational Strategy



June 21, 2010

To Whom It May Concern:

This is to certify that CARL DONALD HADSELL, SS# 233-74-0927,

graduated from West Virginia University with the following degrees:

BACHELOR OF SCIENCE IN BUSINESS ADMINISTRATION with a major in Marketing on August 19, 1969, with Honors

MASTERS IN BUSINESS ADMINISTRATION with a major in Business Administration on August 15, 1970

DOCTOR OF EDUCATION on May 16, 1982

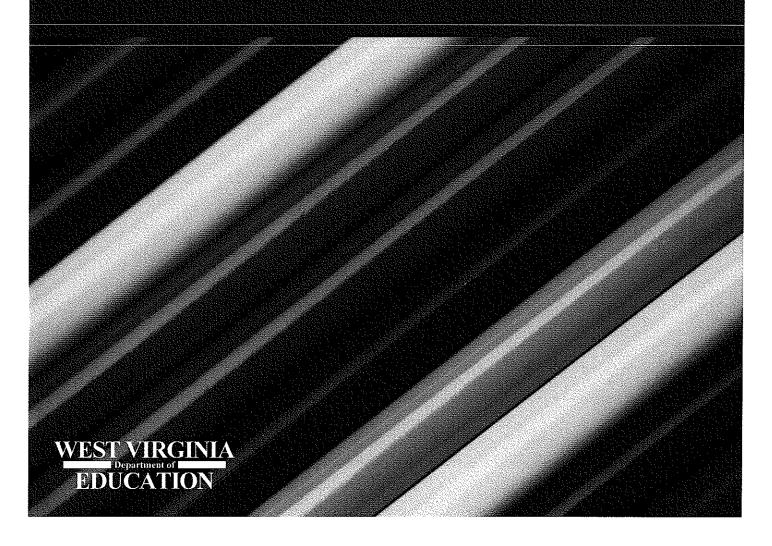
Steve Robinson, Ph.D. University Registrar

Academic Affairs Research Extension and Public Service Information Technology

Mapping the Vision: 2005 - 2010

A Strategic Plan for High Performing Institutional Education Programs

Office of Institutional Education Programs
Transforming Lives Through Education



Advancing New Outcomes: Findings, Recommendations & Initial Actions of the

West Virginia Commission to Study Residential Placements of Children

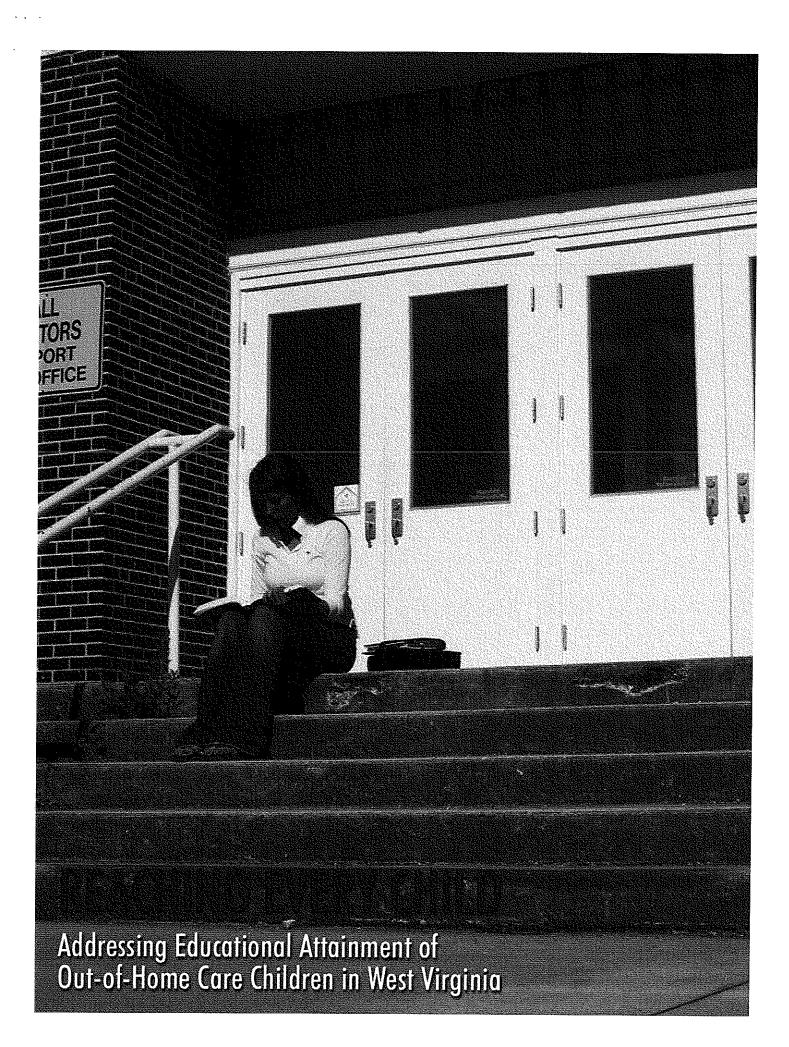
INTERNAL WORKING DRAFT FOR COMMISSION REVIEW

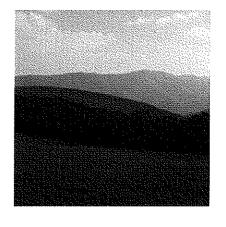


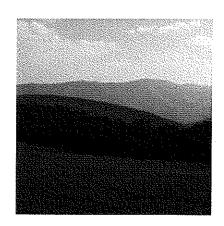
March 15, 2006

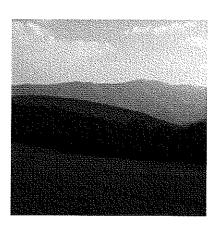
Submitted to The Joint Commission on Government and Finance West Virginia Legislature

Submitted by Martha Y. Walker, Chair **Cabinet Secretary** Department of Health & Human Resources









Realizing Our Potential: Transforming West Virginia's Behavioral Health System

WORKING REPORT

November 17, 2008

Presented to:

West Virginia Legislative Oversight Commission on Health & Human Resources Accountability (LOCHHRA)

Chairmen: Senator Roman Prezioso & Delegate Don Perdue

Presented by:

West Virginia Comprehensive Behavioral Health Commission



Request for

BCF11006

ADDRESS CORRESPONDENCE TO ATTENTION OF:

ROBERTA WAGNER <u> 804-558-0067</u>

*709051207 304-293-5551 CESD INC WVU COLLEGE OF ENGINEERING PO BOX 6070 MORGANTOWN WV 26506-6070

HEALTH AND HUMAN RESOURCES BCF - COMMISSIONER'S OFFICE

350 CAPITOL STREET, ROOM 730 CHARLESTON, WV 25301-3711 304-558-4682

SHIP VIA DATE PRINTED TERMS OF SALE FREIGHT TERMS FOB 06/02/2010 BID OPENING DATE: 06/30/2010 BID OPENING TIME 01:30PM CAT. LINE QUANTITY UOP ITEM NUMBER UNIT PRICE AMOUNT 0001 ΥR 785**-**70 1 TECHNICAL ASSISTANCE, CONSULTATION, MEETING FACILITA TO PROVIDE TECHNICAL ASSISTANCE, CONSULTATION, MEETING FACILITATION REPORT AND REPRESENTATION PREPARATION FOR THE COMMISSION TO STUDY THE RESIDENTIAL PLACEMENT OF CHILDREN AND COORDINATE THE COMMISSION S WORK WITH OTHER COMMISSIONS AND TASK FORCES CENTERED ON THE SAME POPULATION OF CHILDREN! PER THE ATTACHED SPECIFICATIONS SERVICE BEGINNING UPON AWARD AND EXTENDING FOR A PERIOD OF ONE YEAR, WITH THE OPTION OF TWO (2), ONE (1) YEAR RENEWALS. SUBMIT DETAILED MONTHLY INVOICES, IN VENDOR SHALL ARREARS. AWARD WILL BE MADE TO THE LOWEST RESPONSIBLE BIDDER MEETING SPECIFICATIONS. EXHIBIT 3 LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE ON 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 PRIGINAL CONTRACT THE "REASONABLE TIME" PERIOD SHALL DURING THIS "REASONABLE NOT EXCEED TWELVE (12) MONTHS. TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS SEE REVERSE SIDE FOR TERMS AND CONDITIONS ADDRESS CHANGES TO BE NOTED ABOVE



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*709051207 304-293-5551 CESD INC WVU COLLEGE OF ENGINEERING PO BOX 6070 MORGANTOWN WV 26506-6070

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DATE PRINTED TERMS OF SALE SHIP VIA FOB FREIGHT TERMS 06/02/2010 BID OPENING DATE: 06/30/2010 BID OPENING TIME 01:30PM CAT. LINE QUANTITY UOP ITEM NUMBER UNIT PRICE AMOUNT ゆRDERING PRO¢EDUR定: SPENDING UNIT(S) S拍ALL 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. IN THE EVENT THE VENDOR/CONTRACTOR FILES BANKRUPTCY: FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER. 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. REV. 05/26/2009 INQUIRIES: WRITTEN QUESTIONS SHALL BE ACCEPTED THROUGH CLOSE OF 6/15/2010 QUESTIONS MAY BE SENT VIA BUSINESS ON 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 ₽URCHASING DİVISIΦN 2019 WASHINGTON STREET EAST CHARLESTON, WV 25311 SEE REVERSE SIDE FOR TERMS AND CONDITIONS SIGNATURE



Request for

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MORGANTOWN WV 26506-6070 HEALTH AND HUMAN RESOURCES BCF - COMMISSIONER'S OFFICE

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25301-3711

304-558-4682

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State of West Virginia

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). **West Virginia Code**, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the **West Virginia Code**. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

1.	Application is made for 2.5% resident vendor preference for the reason checked: 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, Bidder is a partnership, association or corporation resident vendor and 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 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor 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, Bidder is a 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; or,
2. <u>X</u>	Application is made for 2.5% resident vendor preference for the reason checked: 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; or,
3.	Application is made for 2.5% resident vendor preference for the reason checked: 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 Bidder's 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; or,
4. <u>X</u>	Application is made for 5% resident vendor preference for the reason checked: Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; or,
5. 	Application is made for 3.5% resident vendor preference who is a veteran for the reason checked: Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; or,
6.	Application is made for 3.5% resident vendor preference who is a veteran for the reason checked: Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.
equiren against s	inderstands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the nents for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency sted from any unpaid balance on the contract or purchase order.
authorize he requi	nission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and es the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid ired business taxes, provided that such information does not contain the amounts of taxes paid nor any other information by the Tax Commissioner to be confidential.
ind acc	enalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true urate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate sturing the term of the contract, Bidder will notify the Purchasin Division in writing immediately.
iddor:	CEST IN Sidney: At 1

Title:

"Check any combination of preference consideration(s) indicated above, which you are entitled to receive.

REQNO. BCF11006

Purchasing Affidavit (Revised 12/15/09)

STATE OF WEST VIRGINIA Purchasing Division

PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: 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.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceed five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

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

State of West Virginia Lisa A. Corley 84 Boston St., Morgantown, WV 26508 My Commission Expires May 26, 2019



HODGEMA

RFQ COPY

TYPE NAME/ADDRESS HERE

State of West Virginia Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

Request for Quotation

BCF11006

1

ADDRESS CORRESPONDENCE TO ATTENTION OF ROBERTA WAGNER

304-558-0067

HEALTH AND HUMAN RESOURCES BCF - COMMISSIONER'S OFFICE

350 CAPITOL STREET, ROOM 730 CHARLESTON, WV 25301-3711 304-558-4682

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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. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division

and have paid the required \$125 fee.

- 4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, 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.
- 5. Payment may only be made after the delivery and acceptance of goods or services.
- 6. Interest may be paid for late payment in accordance with the West Virginia Code.
- 7. Vendor preference will be granted upon written request in accordance with the West Virginia Code
- 8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
- 9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
- 10. The laws of the State of West Virginia and the Legislative Rules of the Purchasing Division shall govern the purchasing process.
- 11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties
- 12. BANKRUPTCY: In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
- 13. HIPAA BUSINESS ASSOCIATE ADDENDUM: The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at www.state.wv.us/admin/purchase/vrc/hipaa.htm and is hereby made part of the agreement. Provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
- 14. 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. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf.
 - 15. 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, and the West Virginia Insurance Commission. 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
 - 16. 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 Man Virginia for a state of the st 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 material, 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.

INSTRUCTIONS TO BIDDERS

- 1. Use the quotation forms provided by the Purchasing Division Complete all sections of the quotation form.
- 2. 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. Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
- 4. 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
- 5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).



VENDOR

RFQ COPY

TYPE NAME/ADDRESS HERE

State of West Virginia Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

Request for Quotation

BCF11006

ROBERTA WAGNER 104-558-0067

HEALTH AND HUMAN RESOURCES BCF - COMMISSIONER'S OFFICE

350 CAPITOL STREET, ROOM 730 CHARLESTON, WV

ADDRESS CORRESPONDENCE TO ATTENTION OF

25301-3711 304-558-4682

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State of West Virginia Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

Request for Quotation

BCF11006

PAGE 3

ADDR	ESS CORRESP	ONDENCE TO ATTENTION OF
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HEALTH AND HUMAN RESOURCES BCF - COMMISSIONER'S OFFICE

350 CAPITOL STREET, ROOM 730 CHARLESTON, WV 25301-3711 304-558-4682

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State of West Virginia Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

Request for Quotation

BCF11006

PAGE 1

ADDRESS CORRESPONDENCE TO ATTENTION OF

ROBERTA WAGNER 304-558-0067

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HEALTH AND HUMAN RESOURCES BCF - COMMISSIONER'S OFFICE

350 CAPITOL STREET, ROOM 730 CHARLESTON, WV 25301-3711 304-558-4682

ADDRESS CHANGES TO BE NOTED ABOVE

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VENDOR

State of West Virginia Department of Administration Quotation Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

Request for

BCF11006

ADDRESS CORRESPONDENCE TO ATTENTION OF

ROBERTA WAGNER 304-558-0067

RFQ COPY TYPE NAME/ADDRESS HERE

HEALTH AND HUMAN RESOURCES BCF - COMMISSIONER'S OFFICE

350 CAPITOL STREET, ROOM 730 CHARLESTON, WV 25301-3711 304-558-4682

SHIP VIA DATE PRINTED TERMS OF SALE F.O.B. FREIGHTTERMS 06/18/2010 BID OPENING DATE: 06/30/2010 BID OPENING TIME 01:30PM QUANTITY. LINE UOP. ITEM NUMBER UNITPRICE AMOUNT

> 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 ARDENDUM IS BINDING.

> > COMPANY

SIGNATURE

NOTE: THIS ADDENDUM ACKNOWLEDGEMENT SHOULD BE SUBMITTED WITH THE BID.

REV. 09/21/2009

END OF ADDENDUM NO. 2

SEE REVERSE SIDE FOR TERMS AND CONDITIONS



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ADDRESS CORRESPONDENCE TO ATTENTION OF

ROBERTA WAGNER

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HEALTH AND HUMAN RESOURCES BCF - COMMISSIONER'S OFFICE

350 CAPITOL STREET, ROOM 730 CHARLESTON, WV 25301-3711 304-558-4682

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Vendor Questions and DHHR Responses Submitted in Response to BCF11006

1. Question: During the course of this work, is administrative support available through DHHR BCF or any of the collaborating partners involved in the work of the Commission to Study the Residential Placement of Children? The term administrative support is used here to refer to making copies of meeting documents, the typing of flip chart recordings that would then be emailed to and made into meeting notes by the consultant, website upgrades and the loading of documents to the Commission's website, etc.

Response: DHHR/BCF makes copies/packets unless the facilitator is unable to provide documents in a timely manner. In those instances, the facilitator makes copies. We typically provide 50 packets per meeting. The facilitator has made professional copies of annual reports for distribution. This goes beyond the 50 copies—for DHHR leadership, legislators, Governor's Office in addition to the Commission members & guests (50 copies). The facilitator types flip chart notes, DHHR/BCF does minutes & forwards to facilitator. DHHR/BCF maintains updates to website.

2. Question: What have been the research needs of the Commission historically? Is it anticipated that research related to promising practices, other states' progress, innovations in the field of Systems of Care for children and youth, etc. will be helpful or necessary to the Commission as it fulfills its responsibilities SB636 authorizing the Commission and outlining its work?

Response: The collaborating partners complete the research & prepare reports for presentation to the Commission. The facilitator uses this information in drafting Commission reports & documents. The facilitator has conducted research to better understand the work of the Commission and to enhance their ability to carry out their responsibilities/guidance.

3. Question: Are basic supplies and equipment for meetings available through DHHR BCF or any of the collaborating partners involved in the work of the Commission to Study the Residential Placement of Children? The terms basic supplies and equipment are used here to refer to flip chart stands and flip chart pads of paper.

Response: The facilitator brings flip charts, stands, markers if not provided by site where meeting is being conducted.