



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

Request for Quotation

RFQ NUMBER
 WWV11888

PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
 FRANK WHITTAKER
 304-558-2316

VENDOR

*711124000 703-790-9595
 MANAGEMENT CONCEPTS INC
 8230 LEESBURG PIKE SUITE 800
 VIENNA VA 22182

SHIP TO

WORKFORCE WEST VIRGINIA
 OFFICE OF ADMIN. SUPPORT-5302
 112 CALIFORNIA AVENUE
 CHARLESTON, WV
 25305-0112 304-558-2631

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
03/31/2011				

BID OPENING DATE: 04/28/2011 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		924-25	\$14,500 per course	\$29,000
<p>TRAINING COURSES</p> <p>THE WEST VIRGINIA PURCHASING DIVISION, FOR THE AGENCY, WORKFORCE WEST VIRGINIA, IS SOLICITING BIDS FOR TWO (2) TRAINING COURSES IN FEDERAL GRANTS MANAGEMENT PER THE ATTACHED SPECIFICATIONS.</p> <p>ALL TECHNICAL QUESTIONS MUST BE SUBMITTED IN WRITING TO FRANK WHITTAKER IN THE WV PURCHASING DIVISION VIA EMAIL AT FRANK.M.WHITTAKER@WV.GOV OR VIA FAX AT 304-558-4115. DEADLINE FOR ALL TECHNICAL QUESTIONS IS 04/12/2011 AT 4:00 PM. ALL TECHNICAL QUESTIONS WILL BE ADDRESSED BY ADDENDUM AFTER THE DEADLINE.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p> <p style="text-align: center;">NOTICE</p> <p>A SIGNED BID MUST BE SUBMITTED TO:</p> <p style="text-align: center;">DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130</p>						

RECEIVED
 2011 APR 25 AM 9:40
 WV PURCHASING DIVISION

SEE REVERSE SIDE FOR TERMS AND CONDITIONS			
SIGNATURE <i>Kathy Rougeup</i>	TELEPHONE (703) 270-4013	DATE 4/21/11	
TITLE Account Manager	FEIN 54-1021611	ADDRESS CHANGES TO BE NOTED ABOVE	

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

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).



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED: SEALED BID BUYER: 44 RFQ. NO.: WV11888 BID OPENING DATE: 04/28/2011 BID OPENING TIME: 1:30 PM PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID: (703) 270-4033 ----- CONTACT PERSON (PLEASE PRINT CLEARLY): Kathy Rougeux ----- ***** THIS IS THE END OF RFQ WV11888 ***** TOTAL: \$29,000						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Kathy Rougeux</i>	TELEPHONE (703) 270-4013	DATE 4/21/11
TITLE Account Manager	FEIN 54-1021611	ADDRESS CHANGES TO BE NOTED ABOVE

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

State of West Virginia
WORKFORCE WEST Virginia
Request for Quotation WWV11888

WorkForce West Virginia (WFWV) is seeking a Federal grants management training provider to provide the following training of agency staff, sub-recipients, and staff of partnering entities:

- Conduct two (2) courses to cover the following topics;
 - a) The topic for one (1) class shall cover, but shall not necessarily be limited to, the following areas: 1) preparing for a grant audit; 2) what are typical audit findings to watch for; 3) what are the audit requirements; 4) OMB Circular A-133 audit requirements; and, 5) establishing internal controls;
 - b) The topic for the other class shall cover, but shall not necessarily be limited to, the following areas: 1) Federal requirements for recipient and sub-recipients of Federal grant awards; 2) identifying deficiencies and developing corrective action plan(s) if necessary; and 3) understanding the proper use of audit reports.
- The dates for each training course must be for no less than two (2) but no more than three (3) consecutive days; (3) consecutive eight (8) hour days;
- The training courses should be held at least twenty (25) days apart. The first course must be offered in May and the second in June, 2011;
- The training must be provided in Charleston, West Virginia at a facility designated by WorkForce WV;
- The training shall be for a group of not more than 30 participants;
- The training provider must have provided Federal Grant Training for at least three (3) clients and must provide their contact name and number upon request by WorkForce West Virginia.
- The training provider must offer at least twelve (12) CPE's for each course;
- The training provider must offer a nationally recognized certification program in the area of grants management that is affiliated with associations such as, but not limited to, the National Grants Management Association (NGMA).
- The training provider must supply all training material necessary for the course; and,
- The training provider shall be responsible for any and all of its own travel, lodging, etc costs necessary for each course. Travel expenses will not be reimbursed.

Request for Quotation
For Federal Grants Management Training

Name of Proposing Firm or Vendor: Management Concepts Inc.

	Quantity	Total Proposed Cost
Class I	1	\$14,500
Total		**
Class II	1	\$14,500
Total		**
Grant Total of Class I and II		\$29,000

Note: The first class specifications must be completed by the end of May 2011
The second class specifications must be completed by the end of June 2011

Note: Ancillary expenses (travel, meals, lodging, etc.) **MUST** be included in the proposed class rates.

Award will be based on the lowest Grand Total bid. Only bids from vendors meeting all the requirements of this RFQ will be considered.

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. 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. 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.

Bidder understands if the Secretary of Revenue 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) reject the bid; 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.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of 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.

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.

Bidder: Management Concepts, Inc. Signed: [Signature]
 Date: 4/14/2011 Title: General Counsel

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

RFQ No. WV11888

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 exceeds 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.

WITNESS THE FOLLOWING SIGNATURE

Vendor's Name: Management Concepts, Inc.

Authorized Signature: [Signature] Date: 4/18/2011

State of Virginia

County of Fairfax, to-wit:

Taken, subscribed, and sworn to before me this 18 day of April, 2011.

My Commission expires April 30, 2011.

AFFIX SEAL HERE



NOTARY PUBLIC M. Theresa Jones
Notary Registration # 329382



MANAGEMENT CONCEPTS

April 21, 2011

Mr. Frank Whittaker
Department of Administration
Purchasing Division
Building 15
2019 Washington Street, East
Charleston, WV 25305-0130

Reference: RFQ WWV11888 – Federal Grants Management Training (Audit)

Dear Mr. Whittaker:

Management Concepts is pleased to respond to this requirement to provide instructor-led grants management training for WorkForce West Virginia employees. Delivering high quality grants training is our core business and what we do every day. Over the past 37 years, tens of thousands of public and private sector clients have availed themselves of our services, either by sending individuals students to our open enrollment courses, or by engaging us to conduct on-site grants training for their staff.

Following is our offer to provide on-site training for WorkForce West Virginia:

- Course:** *Audit of Federal Grants and Cooperative Agreements*
- Course Description:** See attachment 1 for a copy of the course syllabus and table of contents.
- Outstanding Instructional Staff:** Management Concepts carefully selected instructors stimulate student interest with their comprehensive subject-matter knowledge. They have extensive experience in the grants field, working either for the federal government and/or the recipient community. Several of our instructors have taught as adjunct faculty members at various institutions of higher education, and many are practicing consultants, serving both federal granting agencies and recipient organizations. Because our instructors are thoroughly involved in the subjects they teach, course presentations are current and relevant to your job-related training needs. See Attachment 2 for the proposed instructor's resume.
- Certificate Program:** Our comprehensive *Grants Management Certificate Program*™ is designed to help candidates develop a solid foundation in grants management. The program offers three tracks—for federal awarding agencies, pass-through entities, and recipients of federal awards—to meet the needs of specific segments of the federal grants community.
- Our Certificate Program is based on feedback we received from business/financial and program personnel representing all members of the grants community—federal, state, local, and Indian tribal governments; colleges and universities; nonprofits; and profit-making entities. We obtained information about typical job duties and tasks; the frequency with which these functions are performed; and the statutes, regulations, and governmentwide guidance that must be followed. We then designed a competency-based program to parallel the skills and knowledge required on the job.
- Grants professionals are expected to possess sophisticated skills and a comprehensive knowledge of governmentwide requirements, agency regulations, and grants management best practices. Our program is

designed to teach you how to understand and apply these requirements and principles to manage federal dollars efficiently and effectively. Completing the Certificate Program can:

- Increase your effectiveness on the job
- Serve as evidence that you have achieved a high level of knowledge and skill in grants management
- Distinguish you from other candidates when seeking career advancement
- Strengthen your chances for long-term success in the field of grants management

The National Grants Management Association (NGMA) recommends Management Concepts' Grants Management Certificate Program as a valuable professional development tool for the grants community.

Length: 2 days.
CEU Credits: 1.3 (0.65 per day)
Location: Client-provided training facility in Charleston, WV.
Proposed Training Dates: May 24-25, 2011.
of Students: Up to a maximum of 30 participants.
Fixed-Price: \$14,500.

The fixed-price includes all instructor travel and per diem, course materials, and certificates for students who successfully complete the course (full attendance is required).

Management Concepts will supply blank roster, attendance, and evaluation forms, and name tents, and we will provide the POC with completed copies of these items, along with final exam grades. WorkForce West Virginia will supply a training facility that will comfortably accommodate your group in table groups and includes the following: a head table, podium, and chair for the instructor; a black/white board, chalk (or markers), and erasers; a flipchart easel, pad, and markers; and an instructor computer, LCD projector and screen for Power Point presentation. After the course presentation, we will send an administrative package containing the completed roster, attendance sheets, student evaluations, and course certificates.

We accept the following forms of payment: purchase order, government training form, credit or purchase card, check, or letter of authorization to bill your organization. Payment paperwork must be received prior to the start of the course. We require a minimum cancellation/rescheduling notice of 30 days.

Audio/videotaping of course presentation is prohibited. Management Concepts will retain copyright and ownership of the course materials.

I can be reached by telephone at 703-270-4013, if you have any questions. We would appreciate the opportunity to be of service.

Sincerely,

Kathy Rougeux

Attachments: Attachment 1 – Course Syllabus and Table of Contents
Attachment 2 – Instructor Resume

AUDIT OF FEDERAL GRANTS AND COOPERATIVE AGREEMENTS

Syllabus

Course Description

This two-day *Audit of Federal Grants and Cooperative Agreements* course (2052) provides an in-depth understanding of the audit requirements for federal grants and cooperative agreements, with a focus on the audit process — from hiring an auditor through audit resolution.

Learning Objectives

Through lecture and individual and group exercises, students will:

- review OMB Circular A-133 audit requirements;
- develop evaluation criteria and choose the most qualified audit firm from competing proposals;
- trace the auditor's steps in conducting an audit;
- review the risk-based approach for determining major programs for a hypothetical recipient;
- use A-133 criteria to evaluate the adequacy of an audit reporting package;
- locate key information in a sample audit reporting package; and
- review sample findings and questioned costs as part of an audit resolution team.

Required Texts

The following required materials will be issued to each student on the first day of class and will be used throughout the course.

Management Concepts®, *Audit of Federal Grants and Cooperative Agreements* ©2011. [Includes text, appendices, and hand-outs.]

Suggested Prerequisites

Introduction to Grants and Cooperative Agreements for Federal Personnel (2040) or *Managing Federal Grants and Cooperative Agreements for Recipient Personnel* (2062)

Successful Completion

Full (100%) attendance is expected and required. Successful completion of the course depends on class attendance and active participation in individual and group exercises. This intermediate course qualifies for 16 CPE credits. The NASBA field of study is Auditing (Governmental).

Course Schedule

Day One	
morning	Introductions and Course Administration Lesson 1: Grants Audits: Type, Scope, Guidance Lesson 2: Audit Readiness Lesson 3: Auditor Procurement
lunch	
afternoon	Lesson 3, Continued Lesson 4: Planning and Conducting the Audit

Day Two	
morning	Lesson 4, Continued Lesson 5: Single Audit Reporting
lunch	
afternoon	Lesson 5, Continued Lesson 6: Audit Followup and Resolution

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 - 11 Sample Reports
 - 12 Sample Single Audit (Town)
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- Grants Management Certificate Program Brochure
- Notes

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B.S., Accounting/Economics, East Tennessee State University

Associate B.S., Accounting/Business Management, Palmer College



MANAGEMENT CONCEPTS

April 21, 2011

Mr. Frank Whittaker
Department of Administration
Purchasing Division
Building 15
2019 Washington Street, East
Charleston, WV 25305-0130

Reference: RFQ WWV11888 – Federal Grants Management Training (Federal requirements for recipients & sub-recipients)

Dear Mr. Whittaker:

Management Concepts is pleased to respond to this requirement to provide instructor-led grants management training for WorkForce West Virginia employees. Delivering high quality grants training is our core business and what we do every day. Over the past 37 years, tens of thousands of public and private sector clients have availed themselves of our services, either by sending individuals students to our open enrollment courses, or by engaging us to conduct on-site grants training for their staff.

Following is our offer to provide on-site training for WorkForce West Virginia:

- Course:** *Evaluating Federal Funds Management Capabilities of Recipients and Subrecipients*
- Course Description:** See attachment 1 for a copy of the course syllabus and table of contents.
- Outstanding Instructional Staff:** Management Concepts carefully selected instructors stimulate student interest with their comprehensive subject-matter knowledge. They have extensive experience in the grants field, working either for the federal government and/or the recipient community. Several of our instructors have taught as adjunct faculty members at various institutions of higher education, and many are practicing consultants, serving both federal granting agencies and recipient organizations. Because our instructors are thoroughly involved in the subjects they teach, course presentations are current and relevant to your job-related training needs. See Attachment 2 for the proposed instructor's resume.
- Certificate Program:** Our comprehensive *Grants Management Certificate Program*™ is designed to help candidates develop a solid foundation in grants management. The program offers three tracks—for federal awarding agencies, pass-through entities, and recipients of federal awards—to meet the needs of specific segments of the federal grants community.
- Our Certificate Program is based on feedback we received from business/financial and program personnel representing all members of the grants community—federal, state, local, and Indian tribal governments; colleges and universities; nonprofits; and profit-making entities. We obtained information about typical job duties and tasks; the frequency with which these functions are performed; and the statutes, regulations, and governmentwide guidance that must be followed. We then designed a competency-based program to parallel the skills and knowledge required on the job.
- Grants professionals are expected to possess sophisticated skills and a comprehensive knowledge of governmentwide requirements, agency regulations, and grants management best practices. Our program is

designed to teach you how to understand and apply these requirements and principles to manage federal dollars efficiently and effectively. Completing the Certificate Program can:

- Increase your effectiveness on the job
- Serve as evidence that you have achieved a high level of knowledge and skill in grants management
- Distinguish you from other candidates when seeking career advancement
- Strengthen your chances for long-term success in the field of grants management

The National Grants Management Association (NGMA) recommends Management Concepts' Grants Management Certificate Program as a valuable professional development tool for the grants community.

Length: 2 days.
CEU Credits: 1.3 (0.65 per day)
Location: Client-provided training facility in Charleston, WV.
Proposed Training Dates: June 22-23, 2011.
of Students: Up to a maximum of 30 participants.
Fixed-Price: \$14,500.

The fixed-price includes all instructor travel and per diem, course materials, and certificates for students who successfully complete the course (full attendance is required).

Management Concepts will supply blank roster, attendance, and evaluation forms, and name tents, and we will provide the POC with completed copies of these items, along with final exam grades. WorkForce West Virginia will supply a training facility that will comfortably accommodate your group in table groups and includes the following: a head table, podium, and chair for the instructor; a black/white board, chalk (or markers), and erasers; a flipchart easel, pad, and markers; and an instructor computer, LCD projector and screen for Power Point presentation. After the course presentation, we will send an administrative package containing the completed roster, attendance sheets, student evaluations, and course certificates.

We accept the following forms of payment: purchase order, government training form, credit or purchase card, check, or letter of authorization to bill your organization. Payment paperwork must be received prior to the start of the course. We require a minimum cancellation/rescheduling notice of 30 days.

Audio/videotaping of course presentation is prohibited. Management Concepts will retain copyright and ownership of the course materials.

I can be reached by telephone at 703-270-4013, if you have any questions. We would appreciate the opportunity to be of service.

Sincerely,

Kathy Rougeux

Attachments: Attachment 1 – Course Syllabus and Table of Contents
Attachment 2 – Instructor Resume

EVALUATING FEDERAL FUNDS MANAGEMENT CAPABILITIES OF RECIPIENTS AND SUBRECIPIENTS

Syllabus

Course Description

This two-day *Evaluating Federal Funds Management Capabilities of Recipients and Subrecipients* course (2042) provides the basic skills needed to determine whether current and prospective federal award recipients and subrecipients are capable of managing federal funds.

Learning Objectives

Through lecture and individual and group exercises, students will:

- perform a cost analysis of a grant budget and identify cost areas requiring explanation;
- explore federal standards for recipient systems and discuss benchmarks for adequacy;
- review a recipient or subrecipient's business management systems to identify deficiencies and determine appropriate corrective actions; and
- use financial statements and audit reports to assess a recipient or subrecipient's federal funds management capabilities.

Required Texts

The following required materials will be issued to each student on the first day of class and will be used throughout the course.

Management Concepts®, *Evaluating Federal Funds Management Capabilities of Recipients and Subrecipients* ©2011. [Includes text, appendices, and handouts.]

Suggested Prerequisites

Introduction to Grants and Cooperative Agreements for Federal Personnel (2040) or Subawarding for Pass-Through Entities: Designing Accountable Programs, Selecting Subrecipients, and Monitoring Subgrants (2075).

Successful Completion

Full (100%) attendance is expected and required. Successful completion of the course depends on class attendance and active participation in individual and group exercises. This intermediate course qualifies for 16 CPE credits. The NASBA field of study is Finance (8 hours) and Specialized Knowledge and Applications (8 hours).

Course Schedule

Day One	
morning	Introductions and Course Administration Lesson 1: Introduction Lesson 2: Cost Analysis
lunch	
afternoon	Lesson 2, Continued
Day Two	
morning	Lesson 3: Reviewing Business Management Systems
lunch	
afternoon	Lesson 4: Evaluating Financial Capability Lesson 5: Documenting Your Evaluation

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2	2 CFR Part 215, Uniform Administrative Requirements for Grants and Agreements With Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations
3	OMB Circular A-102, Grants and Cooperative Agreements with State and Local Governments
4	SF424B and D, Standard Assurance for Non-Construction and Construction Grants
5	Sample Self-Assessments and Certifications
6	Sample Budget Narrative Instructions
7	Sample Business Review Checklists
8	Sample Budget Submissions

9	Sample Financial Statements
10	Special Investigation Audit
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