



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

**Solicitation**

NUMBER	PAGE
PTR13008	1
ADDRESS CORRESPONDENCE TO ATTENTION OF:	
PAUL REYNOLDS 304-558-0468	

VENDOR

RFQ COPY  
 TYPE NAME/ADDRESS HERE  
 Milligan & Company LLC  
 105 North 22nd Street  
 Philadelphia, PA 19103

SHIP TO

DIVISION OF PUBLIC TRANSIT  
 BUILDING 5, ROOM 906  
 1900 KANAWHA BOULEVARD, EAST  
 CHARLESTON, WV  
 25305-0432 304-558-0428

DATE PRINTED  
 09/28/2012

BID OPENING DATE: 10/23/2012 BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. No.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001		EA		205-62		
MONITORING OF PERFORMANCE MEASURES - WORKSHOPS						
THE WEST VIRGINIA STATE PURCHASING DIVISION FOR THE AGENCY, WEST VIRGINIA DIVISION OF PUBLIC TRANSIT IS SOLICITING BIDS FOR A CONSULTANT TO PROVIDE TRAINING AND CONDUCT WORKSHOPS FOR PERFORMANCE MEASUREMENTS TO 5311 RECIPIENTS PER THE ATTACHED SPECIFICATIONS.						
***** THIS IS THE END OF RFQ PTR13008 ***** TOTAL:						

SIGNATURE <i>Paul Malby</i>	TELEPHONE 215 496 9100 X 100	DATE October 23,
TITLE Managing Principal	FEIN 23 3010968	ADDRESS CHANGES TO BE NOTED ABOVE

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

RECEIVED

2012 OCT 24 AM 9:49

WV PURCHASING DIVISION



**State of West Virginia  
Department of Administration  
Purchasing Division**

**NOTICE**

Due to the size of this bid, it was impractical to scan every page for online viewing. We have made an attempt to scan and publish all pertinent bid information. However, it is important to note that some pages were necessarily omitted.

If you would like to review the bid in its entirety, please contact the buyer. Thank you.

\*\*\*

## BID FORM #1

## Pricing Sheet

Task	Item	Est. Qty.	TOTAL COST
2.1.1 – 2.1.3 Three meetings with DPT; three statewide meeting with the sub-recipients; and on-site visits (at least three to each sub-recipient) during the course of the project	Cost of one meeting \$ <u>3,092</u>	x 39	\$ <u>120,596</u>
2.1.4 Technical Assistance to any individual 5311 Sub-recipients; and, mid-year and end of year one meetings with Section 5311 sub-recipients	Technical Assistance to any individual 5311 Sub-recipients \$ <u>127</u> per hour	x 220 hours	\$ <u>27,940</u>
	Cost of meeting \$ <u>7,760</u>	x 2	\$ <u>15,520</u>
2.1.5 Cost to provide assistance to develop spreadsheets, collect data, implementation	Assistance to sub-recipients \$ <u>127</u> per hour for spreadsheets	x 220 hours	\$ <u>27,940</u>
2.1.6 Cost to develop manual on how to collect data	Cost of manual \$ <u>12,274</u>	x 1	\$ <u>12,274</u>
2.1.7 Issue final report	Cost to develop reports \$ <u>5,924</u>	x 1	\$ <u>5,924</u>
2.1.8 Assistance to new sub-recipients	Assistance to new sub-recipients \$ <u>127</u> per hour	x 150 hours	\$ <u>19,050</u>
2.1.9 Five-year financial plan and budgeting workshops and possible additional workshop and technical assistance on above	Cost per Workshop \$ <u>6,422</u>	x 2	\$ <u>12,844</u>
	Technical Assistance on financial plan and budgeting \$ <u>127</u> per hour	x 220 hours	\$ <u>27,940</u>
2.1.10 Financial Training Workshops	Cost per Workshop \$ <u>6,422</u>	x 2	\$ <u>12,844</u>
2.1.11 Establish performance measures for state of good repair	Establish measures for state of good repair \$ <u>127</u> per hour	x 220 hours	\$ <u>27,940</u>

2.1.12 Develop framework for TIP	Develop framework \$ <u>127</u> per hour	x 220 hours	\$ <u>27,940</u>
2.1.13 Develop driver training program for accurate data collection; develop and produce pins	Develop driver training program \$ <u>127</u> per hour	x 220 hours	\$ <u>27,940</u>
	\$ <u>3</u> per pin	x 275	\$ <u>825</u>
<b>GRAND TOTAL BID</b>			\$ <u>367,517</u>

Vendor Name: Milligan & Company, LLC

Date: October 23, 2012 Signature: *John Milligan*

*Award will be made to the lowest responsible bidder which meets the specifications on the basis of Grand Total Bid.*

## BID FORM #2

## CERTIFICATION OF RESTRICTIONS ON LOBBYING

The undersigned (Vendor, Contractor) certifies, to the best of his or her knowledge and belief, that:

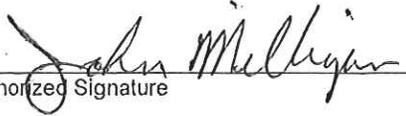
1. No Federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influence or attempt to influence an officer or employee of any Federal agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress regarding the award of a Federal grant, loan (including a line of credit), cooperative agreement, loan guarantee, or loan insurance, or the extension, continuation, renewal, amendment, or modification of any Federal grant, loan (including a line of credit), cooperative agreement, loan guarantee, or loan insurance.
2. If any funds other than Federal appropriated funds have been or will be paid to any person to influence or attempt to influence an officer or employee of any Federal agency, a Member of Congress, an officer or employee of Congress, or any employee of a Member of Congress in connection with any application for a Federal grant, loan (including a line of credit), cooperative agreement, loan guarantee, or loan insurance, the undersigned assures that it will complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," Rev. 7-97; and
3. The undersigned understands that the language of this certification shall be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, subagreements, and contracts under grants, loans (including a line of credit), cooperative agreements, loan guarantees, and loan insurance.

Undersigned understands that this certification is a material representation of fact upon which reliance is placed by the Federal government and that submission of this certification is a prerequisite for providing a Federal grant, loan (including a line of credit), cooperative agreement, loan guarantee, or loan insurance for a transaction covered by 31 U.S.C. 1352. The undersigned also understands that any person who fails to file a required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The (Vendor, Contractor) Milligan & Company, LLC, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the (Vendor, Contractor) understands and agrees that the provisions of 31 U.S.C. §§ 3801, et seq., apply to this certification and disclosure.

October 23, 2012

Date

  
Authorized Signature

Managing Principal

Title

## BID FORM #3

**CERTIFICATION OF PRIMARY PARTICIPANT REGARDING  
DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS**

The Primary Participant (applicant for an FTA grant or cooperative agreement, or potential contractor for a major third party contract),

Milligan & Company, LLC (COMPANY NAME) certifies to the best of its knowledge and belief, that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
2. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.

(If the primary participant (applicant for an FTA grant, or cooperative agreement, or potential third party contractor) is unable to certify to any statements in this certification, the participant shall attach an explanation to this certification.)

THE PRIMARY PARTICIPANT (APPLICANT FOR AN FTA GRANT OR COOPERATIVE AGREEMENT, OR POTENTIAL CONTRACTOR FOR A MAJOR THIRD PARTY CONTRACT),

John Milligan, CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET SEQ. ARE APPLICABLE THERETO.

 Managing Principal  
Signature and Title of Authorized Official

BID FORM #4

Milligan & Company, LLC hereby certifies that it  IS or  IS NOT  
(check the appropriate box) included on the U.S. Comptroller General's Consolidated List of  
Persons or Firms Currently Debarred for violations of Various Public Contracts Incorporating  
Labor Standards Provisions.

October 23, 2012

Date

Authorized Signature

John Milligan  
Managing Principal

Title

Milligan & Company,

Company Name

BID FORM #5

VENDOR'S CERTIFICATION OF UNDERSTANDING AND ACCEPTANCE

The Contractor hereby certifies that all Technical Specifications and Contract Terms and Conditions have been carefully reviewed, are fully understood and shall be adhered to in the performance and completion of any contract resulting from this bid.

October 23, 2012

Date \_\_\_\_\_  
Authorized Signature John Milligan \_\_\_\_\_  
Managing Principal \_\_\_\_\_  
Title \_\_\_\_\_  
Milligan & Company, LLC \_\_\_\_\_  
Company Name \_\_\_\_\_

BID FORM #6

RFQ No. PTR13008

STATE OF WEST VIRGINIA  
Purchasing Division

**PURCHASING AFFIDAVIT**

**MANDATE:** Under W. Va. Code §5A-3-10a, 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: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

**EXCEPTION:** The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. 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.

**DEFINITIONS:**

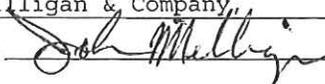
"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due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

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"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.

**AFFIRMATION:** By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

**WITNESS THE FOLLOWING SIGNATURE:**

Vendor's Name: Milligan & Company  
Authorized Signature:  Date: October 23, 2012

State of Pennsylvania

County of Philadelphia, to-wit:

Taken, subscribed, and sworn to before me this \_\_\_ day of \_\_\_\_\_, 20\_\_.

My Commission expires \_\_\_\_\_, 20\_\_.

AFFIX SEAL HERE

NOTARY PUBLIC \_\_\_\_\_

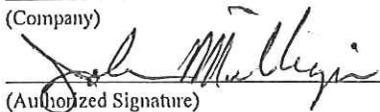
*Purchasing Affidavit (Revised 07/01/2012)*

CERTIFICATION AND SIGNATURE PAGE

By signing below, I certify that I have reviewed this Solicitation in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this bid or proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

Milligan & Company, LLC

(Company)



(Authorized Signature)

John Milligan, Managing Principal

(Representative Name, Title)

215 496 9100 ext 100      215 496 0980

(Phone Number)

(Fax Number)

October 23, 2012

(Date)

Revised 6/15/2012

**ADDENDUM ACKNOWLEDGEMENT FORM**

**SOLICITATION NO.:** PTR13008

**Instructions:** Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

**Acknowledgment:** I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

**Addendum Numbers Received:**

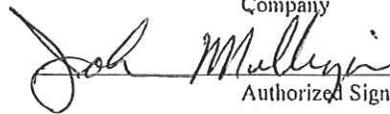
(Check the box next to each addendum received)

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6  |
| <input type="checkbox"/> Addendum No. 2            | <input type="checkbox"/> Addendum No. 7  |
| <input type="checkbox"/> Addendum No. 3            | <input type="checkbox"/> Addendum No. 8  |
| <input type="checkbox"/> Addendum No. 4            | <input type="checkbox"/> Addendum No. 9  |
| <input type="checkbox"/> Addendum No. 5            | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further 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.

\_\_\_\_\_  
Milligan & Company, LLC

Company



\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
October 23, 2012

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

Revised 6/15/2012



State of West Virginia  
 Department of Administration  
 Purchasing Division  
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**Solicitation**

NUMBER	PAGE
PTR13008	1
ADDRESS CORRESPONDENCE TO ATTENTION OF:	
PAUL REYNOLDS 304-558-0468	

VENDOR

RFQ COPY  
 TYPE NAME/ADDRESS HERE  
 Milligan & Company LLC  
 105 North 22nd Street  
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SHIP TO

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 BUILDING 5, ROOM 906  
 1900 KANAWHA BOULEVARD, EAST  
 CHARLESTON, WV  
 25305-0432 304-558-0428

DATE PRINTED  
 10/15/2012  
 BID OPENING DATE: 10/23/2012

BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
				ADDENDUM NO. 1		
				ADDENDUM NO. 1 CREATED TO:		
				ANSWER VENDOR TECHNICAL QUESTIONS		
				BID DATE REMAINS UNCHANGED		
				BID OPENING DATE: OCTOBER 23, 2012 AT 1:30 P.M.		

SIGNATURE: <i>John Milligan</i>	TELEPHONE: 215 496 9100 X 100	DATE: October 23, 2012
TITLE: Managing Principal	FERN: 23 3010968	ADDRESS CHANGES TO BE NOTED ABOVE

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

**SOLICITATION NUMBER: PTR13008**  
**Addendum Number: 1**

The purpose of this addendum is to modify the solicitation identified as PTR13008 ("Solicitation") to reflect the change(s) identified and described below.

**Applicable Addendum Category:**

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error

**Description of Modification to Solicitation: Add Required Bid Forms to Solicitation**

**Additional Documentation:** Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

**Terms and Conditions:**

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Revised 6/8/2012



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

**Solicitation**

NUMBER  
 PTR13008

PAGE  
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF:  
 PAUL REYNOLDS  
 304-558-0468

VENDOR

RFQ COPY  
 TYPE NAME/ADDRESS HERE  
 Milligan & Company LLC  
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DIVISION OF PUBLIC TRANSIT  
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 1900 KANAWHA BOULEVARD, EAST  
 CHARLESTON, WV  
 25305-0432 304-558-0428

DATE PRINTED  
 10/19/2012

BID OPENING DATE: 10/25/2012 BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
				ADDENDUM NO. 02		
				ADDENDUM NO. 2 IS CREATED TO:		
				REVISE BID FORM #1/PRICING SHEET		
				CHANGE BID OPENING DATE		
				FROM: OCTOBER 23, 2012 AT 1:30 P.M.		
				TO: OCTOBER 25, 2012 AT 1:30 P.M.		
0001		EA		205-62		
				MONITORING OF PERFORMANCE MEASURES - WORKSHOPS		
***** THIS IS THE END OF RFQ PTR13008 ***** TOTAL:						

SIGNATURE *John Milligan* TELEPHONE 215 496 9100 X 100 DATE October 23, 2012  
 TITLE Managing Principal FEIN 23 3010968 ADDRESS CHANGES TO BE NOTED ABOVE

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

**SOLICITATION NUMBER: PTR13008**  
**Addendum Number: 2**

The purpose of this addendum is to modify the solicitation identified as PTR13008 ("Solicitation") to reflect the change(s) identified and described below.

**Applicable Addendum Category:**

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error

**Description of Modification to Solicitation: Revised Pricing Sheet**

**Additional Documentation:** Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

**Terms and Conditions:**

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Revised 6/8/2012

ATTACHMENT A

1. Revise Pricing Sheet

2. Change Bid Opening date

From: October 23, 2012 at 1:30 P.M.

To: October 25, 2012 at 1:30 P.M.

3. The addendum acknowledgement is attached. This document should be signed and returned with your bid. Failure to sign and return may result in disqualification.

Revised 6/8/2012

**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: PTR13008**

**Instructions:** Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

**Acknowledgment:** I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

**Addendum Numbers Received:**

(Check the box next to each addendum received)

- |  |  |
|--|--|
| <input type="checkbox"/> Addendum No. 1            | <input type="checkbox"/> Addendum No. 6  |
| <input checked="" type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7  |
| <input type="checkbox"/> Addendum No. 3            | <input type="checkbox"/> Addendum No. 8  |
| <input type="checkbox"/> Addendum No. 4            | <input type="checkbox"/> Addendum No. 9  |
| <input type="checkbox"/> Addendum No. 5            | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that 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.

\_\_\_\_\_  
Milligan & Company, LLC

Company



\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
October 23, 2012

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

Revised 6/8/2012