



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

BHS70097

PAGE

1

ADDRESS CORRESPONDENCE TO ATTENTION OF:

ROBERTA WAGNER
304-558-0067

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

HEALTH AND HUMAN RESOURCES
BBH/HF
ROOM 350
350 CAPITOL STREET
CHARLESTON, WV
25301-3702 304-558-3672

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
04/02/2007				

BID OPENING DATE:

05/08/2007

BID OPENING TIME

01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	JB		961-20		\$32,500.00
CONSULTING SERVICES FOR PLANNING, LEADERSHIP AND						
TO PROVIDE CONSULTING SERVICES ON PLANNING, LEADERSHIP, AND STRATEGIZING ON ORGANIZATIONAL FUNCTIONING FOR THE BUREAU FOR BEHAVIORAL HEALTH & HEALTH FACILITIES, PER THE ATTACHED 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 ORIGINAL CONTRACT. THE "REASONABLE TIME" PERIOD SHALL NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS WRITTEN NOTICE.						
UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT, THE TERMS, CONDITIONS AND PRICING SET HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT.						
RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR, SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30) DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	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. All quotations are governed by the *West Virginia Code* and the *Legislative Rules* of the Purchasing Division.
4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125.00 registration fee.
5. All services performed or goods delivered under State Purchase Orders/Contracts are to be continued for the term of the Purchase Order/Contract, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
6. Payment may only be made after the delivery and acceptance of goods or services.
7. Interest may be paid for late payment in accordance with the *West Virginia Code*.
8. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, this contract is automatically null and void, and is terminated without further order.
14. **HIPAA Business Associate Addendum** - The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Covered Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.

INSTRUCTIONS TO BIDDERS

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

SIGNED BID TO:

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



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BID OPENING DATE: 05/08/2007		BID OPENING TIME 01:30PM				
LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS.</p> <p>CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICE SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THIS CONTRACT IS AUTOMATICALLY NULL AND VOID, AND IS TERMINATED WITHOUT FURTHER ORDER.</p> <p>INQUIRIES: WRITTEN QUESTIONS SHALL BE ACCEPTED THROUGH CLOSE OF BUSINESS ON APRIL 17, 2006. QUESTIONS MAY BE SENT VIA USPS, FAX, COURIER OR E-MAIL. IN ORDER TO ASSURE NO VENDOR RECEIVES AN UNFAIR ADVANTAGE, NO SUBSTANTIVE QUESTIONS WILL BE ANSWERED ORALLY. IF POSSIBLE, E-MAIL QUESTIONS ARE PREFERRED. ADDRESS INQUIRIES TO:</p> <p>ROBERTA WAGNER DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25311 FAX: 304-558-4115 E-MAIL: RWAGNER@WVADMIN.GOV</p> <p>VENDOR PREFERENCE CERTIFICATE</p> <p>CERTIFICATION AND APPLICATION* IS HEREBY MADE FOR</p>						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE			TELEPHONE		DATE	
TITLE		FEIN		ADDRESS CHANGES TO BE NOTED ABOVE		

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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
PREFERENCE IN ACCORDANCE WITH WEST VIRGINIA CODE, 5A-3-37 (DOES NOT APPLY TO CONSTRUCTION CONTRACTS).						
A. APPLICATION IS MADE FOR 2.5% PREFERENCE FOR THE REASON CHECKED:						
() 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 HEAD-QUARTERS OR PRINCIPAL PLACE OF BUSINESS CONTINUOUSLY IN WEST VIRGINIA FOR FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION; OR 80% OF THE OWNERSHIP INTEREST OF BIDDER IS HELD BY ANOTHER INDIVIDUAL, PARTNERSHIP, ASSOCIATION OR CORPORATION RESIDENT 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 CORPORATION NONRESIDENT VENDOR WHICH HAS AN AFFILIATE OR SUBSIDIARY WHICH EMPLOYS A MINIMUM OF ONE HUNDRED STATE RESIDENTS AND WHICH HAS MAINTAINED ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS WITHIN WEST VIRGINIA CONTINUOUSLY FOR THE FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION.						
B. APPLICATION IS MADE FOR 2.5% PREFERENCE FOR THE REASON CHECKED:						
(✓) BIDDER IS A RESIDENT VENDOR WHO CERTIFIES THAT, DURING THE LIFE OF THE CONTRACT, ON AVERAGE AT LEAST						

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<p>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 () BIDDER IS A NONRESIDENT VENDOR EMPLOYING A MINIMUM OF ONE HUNDRED STATE RESIDENTS OR IS A NONRESIDENT VENDOR WITH AN AFFILIATE OR SUBSIDIARY WHICH MAINTAINS ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS WITHIN WEST VIRGINIA EMPLOYING A MINIMUM OF ONE HUNDRED STATE RESIDENTS WHO CERTIFIES THAT, DURING THE LIFE OF THE CONTRACT, ON AVERAGE AT LEAST 75% OF THE EMPLOYEES OR BIDDERS' AFFILIATE'S OR SUBSIDIARY'S EMPLOYEES ARE RESIDENTS OF WEST VIRGINIA WHO HAVE RESIDED IN THE STATE CONTINUOUSLY FOR THE TWO YEARS IMMEDIATELY PRECEDING SUBMISSION OF THIS BID.</p> <p>BIDDER UNDERSTANDS IF THE SECRETARY OF TAX & REVENUE DETERMINES THAT A BIDDER RECEIVING PREFERENCE HAS FAILED TO CONTINUE TO MEET THE REQUIREMENTS FOR SUCH PREFERENCE, THE SECRETARY MAY ORDER THE DIRECTOR OF PURCHASING TO: (A) RESCIND THE CONTRACT OR PURCHASE ORDER ISSUED; OR (B) ASSESS A PENALTY AGAINST SUCH BIDDER IN AN AMOUNT NOT TO EXCEED 5% OF THE BID AMOUNT AND THAT SUCH PENALTY WILL BE PAID TO THE CONTRACTING AGENCY OR DEDUCTED FROM ANY UNPAID BALANCE ON THE CONTRACT OR PURCHASE ORDER.</p> <p>BY SUBMISSION OF THIS CERTIFICATE, BIDDER AGREES TO DISCLOSE ANY REASONABLY REQUESTED INFORMATION TO THE PURCHASING DIVISION AND AUTHORIZES THE DEPARTMENT OF TAX AND REVENUE TO DISCLOSE TO THE DIRECTOR OF PURCHASING APPROPRIATE INFORMATION VERIFYING THAT BIDDER HAS PAID THE REQUIRED BUSINESS TAXES, PROVIDED THAT SUCH INFORMATION DOES NOT CONTAIN THE AMOUNTS OF TAXES PAID NOR ANY OTHER INFORMATION DEEMED BY THE TAX</p>						

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PLEASE NOTE: A CONVENIENCE COPY WOULD BE APPRECIATED.						
THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:						
SEALED BID						
BUYER:-----ROBERTA WAGNER/FILE 22-----						
RFQ. NO.:-----BHS70097-----						
BID OPENING DATE:-----MAY 8, 2007-----						
BID OPENING TIME:-----1:30 PM-----						
PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID:						
(304) 293-6707						
CONTACT PERSON (PLEASE PRINT CLEARLY):						
Carol Hadsell						

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007

**WEST VIRGINIA DEPARTMENT OF HEALTH AND
HUMAN RESOURCES BUREAU FOR BEHAVIORAL
HEALTH AND HEALTH FACILITIES OFFICE OF HEALTH
FACILITIES 350 CAPITOL STREET, ROOM 350
CHARLESTON, WEST VIRGINIA 25301-3702**

Request for Quotation

RFQ# BHS70097

ADMINISTRATIVE AND CONTRACTUAL TERMS

Project Background:

The Bureau for Behavioral Health and Health Facilities (BHHF), within the West Virginia Department of Health and Human Resources (DHHR), is undergoing significant change as it works internally to meet the many demands placed on it from a variety of areas as the state level agency responsible for behavioral health in WV. While undergoing its internal work, a legislative mandated Comprehensive Behavioral Health Commission has been established. BHHF has a primary role in seeing that this Commission meets its charge. This includes being able to adjust its operation and/or organizational structure to recommendations stemming from the Commission's work.

Effective organizations undertake organizational audits to ensure that management operations, processes, policy and staffing coverage are at required performance levels for both current and future needs. Incorporating organizational development work (e.g., structure, operating units, functions, roles and responsibilities, succession, depth of management skills across the organization) as part of the planning process can help achieve this objective in a most effective manner. Part of this work would be working directly with the BHHF leadership, an identified planning team and with individual staff members, as warranted, to assist focus on a successful organizational assessment and addressing issues that may surface. This should also include work with organizations currently working on BHHF initiatives and with the Comprehensive Behavioral Health Commission technical staff.

BHHF recognizes the value of seeking external technical assistance to help design and facilitate the organizational development and planning work. This includes external third party objective evaluation assessment in areas such as organizational development, roles and responsibilities and other internal assessments.

Project Scope:

BHHF seeks a logical approach for an organizational development and planning project. The suggested project work plan shall include the following tasks:

1. Final Project Plan Development, Project Management Work

- a. Vendor must gather and review background materials and work closely with BHHF leadership to develop the final specific action plan (scope) for the project including needed advance work, key issues generation and working with existing contractors involved in technical assistance and planning.
- b. Vendor shall work with the BHHF leadership or designated planning team to design the organizational development and targeted planning process to include immediate work on organizational development issues as determined in Task 1. General planning and project management shall be connected to this task.

2. Assessment & Organizational Development Work

- a. Vendor shall conduct secondary and primary internal assessments related to BHHF's planning process and organizational development work. This shall include review of existing secondary data and the collection of specific data readily available on topics relevant to the project's goals.
- b. BHHF-wide interviews (one-on-one, focus groups, and surveys) shall be conducted, along with selected external ones with other DHHR leaders and other key leaders connected with BHHF activities, to collect first-hand information regarding issues around the planning and organizational assessment work. This assessment work shall include a specific focus on organizational development needs. A final assessment list shall be developed as part of the above Task 1.
- b. Vendor shall work with the BHHF leadership to provide results of assessments with specific focus on organizational issues and planning needs. These outcomes shall be categorized by immediate attention and by those that shall be incorporated into the normal planning implementation activities. This assumes appropriate meetings to discuss and take specific actions on assessment results.

3. Facilitated Planning Work

- a. Vendor shall plan, prepare and facilitate organizational development work sessions with the BHHF leadership and planning team and the organization as determined in the planning work design. This would include working with BHHF

leadership in preparing the agenda, participant's list, exercises, assessment summaries, etc., in advance of actual planning session(s).

- b. This work shall include an organizational functions analysis that should lead to possible recommendations for the organizational structure and management of BHHF to improve operational efficiency and effectiveness.
- c. Work shall include attention to developing the most appropriate planning implementation process for BHHF including providing examples of practices for effective implementation of strategic plans.
- d. Vendor shall provide appropriate notes from the planning and organizational development sessions to BHHF.

4. BHHF Leadership Development Work

- a. Vendor shall work with the current BHHF Leadership Team to build an effective team with capacity to integrate the Department's Leadership Excellence Initiative (LEI) into the Bureau as appropriate. This shall include the best way to coordinate LEI with existing training within BHHF.

5. Coordination with Behavioral Health Commission Work

- a. Vendor shall provide a technical assistance link and coordination between the Commission work and that within BHHF. Vendor shall serve to coordinate the various initiatives being conducted concurrently with the Commission work and the BHHF activities.

6. Direct production support and materials

- a. All costs associated with production staff in support of editing, logistics, copies of materials will be considered routine, and must be included in the cost proposal. Additional copies requested by the Bureau will be charged at cost. BHHF will be allowed to request a master copy of all documents at no additional cost. Vendors bid shall include the costs for standard progress reports, draft planning documents and other materials to support the project.

Mandatory Requirements:

- Vendor must include travel and direct expenses in the bid for professional fees.
- Vendor must begin work immediately upon award of contract.

Mandatory Qualifications:

- a. Vendor must provide a detailed work history, including references, for each of the following qualifications:
 - Vendor must provide resume(s) of project team.
 - Vendor must demonstrate a minimum of (3) three years experience in doing organizational functional analysis and development work by providing a detailed work history, including references.
 - Vendor must demonstrate a minimum of (1) one year experience with DHHR Leadership Excellence Initiative (LEI) and be able to deliver the training material used within LEI.
 - Vendor must demonstrate strong experience in facilitation, training and leadership coaching.
 - Vendor must demonstrate experience in strategic planning in the public sector (preferred in state government areas working with human services), to include practical experience with executive of plans (implementation processes).
 - Vendor must demonstrate experience specific with large process improvement initiatives involving multiple working groups and associated processing requirements.

PROCUREMENT SPECIFICATIONS

Cancellation:

The Director of Purchasing reserves the right to cancel this contract immediately upon written notice to the vendor if the commodities and/or services supplied are of an inferior quality or do not conform to the specifications of the bid and contract herein.

Vendor Registration:

Vendors participating in this process should complete and file a Vendor Registration and Disclosure Statement (Form WV-1) and remit the registration fee. Vendor is not required to be a registered vendor in order to submit a Quotation, but the successful vendor must register and pay the fee prior to the award of an actual purchase order/contract.

"No Debt Affidavit":

West Virginia State Code 5A-3-1-a-(3)(d) requires that all vendors submit an affidavit of debt, which certifies that there are no outstanding obligations or debts owing the State of West Virginia. The Debt Affidavit is attached to this request for Quotation which must be completed, signed, and returned with the vendor's Quotation. If bidding a joint Quotation, a Debt Affidavit must be completed for both vendors.

Agreement Addendum: WV-96:

Any contract resulting from an award from this RFQ and a vendor's quotation must include, but is not limited to, in its terms and conditions all mandatory sections contained herein. Failure of the successful vendor to sign an Agreement Addendum (Form WV-96) as part of the contract may result in forfeiture of the bid bond. Agreement Addendum submissions requirements are outlined in "Procurement Specifications". Agreement Addendum (Form WV-96) can be found by clicking on Vendor Resource Center on Website <http://www.state.wv.us/admin/purchase>.

Subcontracts Prohibited:

The Successful vendor will be solely responsible for all work performed under the contract. The vendor shall not enter into written subcontracts for performance or work under the contract without written permission of the Department.

Renewal:

This contract may be renewed upon mutual agreement of both parties. The renewal is limited to two (2), one (1) year renewals.

A F F I D A V I T

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 owned 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.

LICENSING:

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

CONFIDENTIALITY:

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

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

Vendor's Name: CESD, Inc.Authorized Signature: Cue [Signature]Date: 5-7-07

AGREEMENT ADDENDUM

013

In the event of conflict between this addendum and the agreement, this addendum shall control:

1. ARBITRATION - Any references to arbitration contained in the agreement are hereby deleted. Disputes arising out of the agreement shall be presented to the West Virginia Court of Claims.
2. HOLD HARMLESS - Any clause requiring the Agency to indemnify or hold harmless any party is hereby deleted in its entirety.
3. GOVERNING LAW - The agreement shall be governed by the laws of the State of West Virginia. This provision replaces any references to any other State's governing law.
4. TAXES - Provisions in the agreement requiring the Agency to pay taxes are deleted. As a State entity, the Agency is exempt from Federal, State, and local taxes and will not pay taxes for any Vendor including individuals, nor will the Agency file any tax returns or reports on behalf of Vendor or any other party.
5. PAYMENT - Any references to prepayment are deleted. Payment will be in arrears.
6. INTEREST - Should the agreement include a provision for interest on late payments, the Agency agrees to pay the maximum legal rate under West Virginia law. All other references to interest or late charges are deleted.
7. RECOUPMENT - Any language in the agreement waiving the Agency's right to set-off, counterclaim, recoupment, or other defense is hereby deleted.
8. FISCAL YEAR FUNDING - Service performed under the agreement may be continued in succeeding fiscal years for the term of the agreement, contingent upon funds being appropriated by the Legislature or otherwise being available for this service. In the event funds are not appropriated or otherwise available for this service, the agreement shall terminate without penalty on June 30. After that date, the agreement becomes of no effect and is null and void. However, the Agency agrees to use its best efforts to have the amounts contemplated under the agreement included in its budget. Non-appropriation or non-funding shall not be considered an event of default.
9. STATUTE OF LIMITATION - Any clauses limiting the time in which the Agency may bring suit against the Vendor, lessor, individual, or any other party are deleted.
10. SIMILAR SERVICES - Any provisions limiting the Agency's right to obtain similar services or equipment in the event of default or non-funding during the term of the agreement are hereby deleted.
11. ATTORNEY FEES - The Agency recognizes an obligation to pay attorney's fees or costs only when assessed by a court of competent jurisdiction. Any other provision is invalid and considered null and void.
12. ASSIGNMENT - Notwithstanding any clause to the contrary, the Agency reserves the right to assign the agreement to another State of West Virginia agency, board or commission upon thirty (30) days written notice to the Vendor and Vendor shall obtain the written consent of Agency prior to assigning the agreement.
13. LIMITATION OF LIABILITY - The Agency, as a State entity, cannot agree to assume the potential liability of a Vendor. Accordingly, any provision limiting the Vendor's liability for direct damages or limiting the Vendor's liability under a warranty to a certain dollar amount or to the amount of the agreement is hereby deleted. In addition, any limitation is null and void to the extent that it precludes any action for injury to persons or for damages to personal property.
14. RIGHT TO TERMINATE - Agency shall have the right to terminate the agreement upon thirty (30) days written notice to Vendor.
15. TERMINATION CHARGES - Any provision requiring the Agency to pay a fixed amount or liquidated damages upon termination of the agreement is hereby deleted. The Agency may only agree to reimburse a Vendor for actual costs incurred or losses sustained during the current fiscal year due to wrongful termination by the Agency prior to the end of any current agreement term.
16. RENEWAL - Any reference to automatic renewal is hereby deleted. The agreement may be renewed only upon mutual written agreement of the parties.
17. INSURANCE - Any provision requiring the Agency to insure equipment or property of any kind and name the Vendor as beneficiary or as an additional insured is hereby deleted.
18. RIGHT TO NOTICE - Any provision for repossession of equipment without notice is hereby deleted. However, the Agency does recognize a right of repossession with notice.
19. ACCELERATION - Any reference to acceleration of payments in the event of default or non-funding is hereby deleted.
20. AMENDMENTS - All amendments, modifications, alterations or changes to the agreement shall be in writing and signed by both parties. No amendment, modification, alteration or change may be made to this addendum without the express written approval of the Purchasing Division and the Attorney General.

ACCEPTED BY:
STATE OF WEST VIRGINIA

Spending Unit: _____

Signed: _____

Title: _____

Date: _____

VENDOR

Company Name: CESD Inc.

Signed: Carl D. Wade

Title: Managing Director

Date: 5-7-07



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

BHS70097

PAGE

1

ADDRESS CORRESPONDENCE TO ATTENTION OF

ROBERTA WAGNER
304-558-0067

*709051207 304-293-5551

CESD INC
WVU COLLEGE OF ENGINEERING
PO BOX 6070
MORGANTOWN WV 26506-6070

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HEALTH AND HUMAN RESOURCES
BBH/HF
ROOM 350
350 CAPITOL STREET
CHARLESTON, WV
25301-3702 304-558-3672

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
04/25/2007				

BID OPENING DATE:

05/08/2007

BID OPENING TIME

01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM NO. 1						
1. QUESTIONS AND ANSWERS ATTACHED.						
2. ADDENDUM ACKNOWLEDGEMENT IS ATTACHED. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN DISQUALIFICATION OF YOUR BID.						
END OF ADDENDUM NO. 1						
0001	1	JB		961-20		
CONSULTING SERVICES FOR PLANNING, LEADERSHIP AND						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	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. All quotations are governed by the *West Virginia Code* and the *Legislative Rules* of the Purchasing Division.
4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125.00 registration fee.
5. All services performed or goods delivered under State Purchase Orders/Contracts are to be continued for the term of the Purchase Order/Contract, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
6. Payment may only be made after the delivery and acceptance of goods or services.
7. Interest may be paid for late payment in accordance with the *West Virginia Code*.
8. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, this contract is automatically null and void, and is terminated without further order.
14. **HIPAA Business Associate Addendum** - The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Covered Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.

INSTRUCTIONS TO BIDDERS

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

SIGNED BID TO:

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

ADDENDUM NO. 1

Bureau for Behavioral Health & Health Facilities
Office of Behavioral Health Services
Fiscal Division
350 Capitol Street, Room 350
Charleston, WV 25301-3702
Telephone: (304) 558-0627 Fax: (304) 558-1008

Requisition No. BHS70097
Addendum for Vendor Questions

Question #1: Must the vendor have LEI experience and have worked with LEI standards and training material used within West Virginia for at least a year?

Answer: Yes, LEI experience is mandatory, and vendor must be able to demonstrate their experience.

Question #2: Can a waiver be granted for the 2.5% preference if the vendor has performed contracted work in West Virginia in the past if the vendor is a Vietnam Disabled Vet Company?

Answer: This vendor preference is not associated with the veterans in any way as it is designated as an "in-state" vendor preference and not service related.

PURCHASING CONTINUATION SHEET

Buyer: RW-22	Page 3	Req. or P.O. No.: BHS70097
Spending Unit:		

Vendor:

Requisition No.: BHS70097

ADDENDUM ACKNOWLEDGEMENT

I hereby acknowledge receipt of the following checked addendum(s) and have made the necessary revisions to my proposal, plans and/or specifications, etc.

Addendum No.'s:

No. 1 ✓No. 2 No. 3 No. 4 No. 5

I understand that failure to confirm the receipt of the addendum(s) may be cause for rejection of bids.



Signature

CESD, INC.

Company

5-7-07

Date

The Center for Entrepreneurial Studies and Development, Inc. (CESD)
Specifics to RFQ #BHS70097

Mandatory Requirements:

The bid total provided by CESD, Inc. includes all anticipated travel and direct expenses and therefore is covered within the bid price provided.

CESD, Inc. is available to begin work immediately on the project upon formal award of the contract.

Qualification Statement:

The Center for Entrepreneurial Studies and Development, Inc. (CESD) a West Virginia organization has over twenty (20) years working with different organizations in WV – both in the public and private sectors. The following demonstrates CESD's actual experience and skills sought in this Request for Quotation.

The project team includes Carl Hadsell (project manager), Matt West, Kim Spangler and Holly Clark. The bio sketches of each are attached with this bid. (See Attachment #1)

Demonstrate three (3) years in doing organizational functional analysis and development work:

The following table lists specific projects (organizations) within the past few years that reflect some level of organizational functional analysis and other skills performed by CESD. In some cases, the key reference has moved to another position, but each has a reference for a person who should be able to speak to what CESD performed on the project. CESD has developed a specific process for review of the organization's structure and logical functional analysis.

Client	Work	Date
PEIA (WV) Tom Sussman (Former Director) Jerry Roueche (now at WVDHHR can speak to this project) Building 3, Room 206 Capitol Complex 1900 Kanawha Blvd., East Charleston, WV 25301 (304) 558 9144	Organizational functional analysis, complete reorganization process to build a different organizational structure	2001 - 2004
Petroleum Development Corporation (PDC) Steve Williams PO Box 26 Bridgeport, WV 26330 (304) 842-6256	Analysis, new organization structure, including job descriptions and roles and responsibilities, and leadership training activities	2005 – 2007

Tom Sims – Office of Epidemiology and Health Promotion -DHHR, WV Office number – (304) 558-9103	Work with small unit to define how best to organize the positions to maximize the work outcomes.	2006
Beverage Distributors Vince D'Annunzio 200 Ferry Street PO Box 866 Clarksburg, WV 26301 (304) 624-4261	Organization structure including functional analysis leading to a first documented organizational chart.	2005 – 2007

There are other examples both within public and private sector that can be added to this list.

Demonstrate One year experience with LEI:

CESD has first hand experience with the WVDHHR Leadership in Excellence Initiative (LEI) by providing a number of Leadership training sessions in the recent past. In addition, CESD helped develop and, in some cases, customized the materials that support the WVDHHR Secretary's effective decision-making initiative which was a major part of the LEI program. CESD has worked with the DHHR training and development staff in providing other course material for the LEI program. CESD has also assisted some units within WVDHHR with LEI activities.

Vendor must demonstrate strong experience in facilitation, training and leadership coaching.

The members of the CESD team, under the project management of Carl Hadsell, all have experience in facilitation, training and leadership coaching. The earlier referenced projects in the table above included using these skills to varying degrees.

CESD (team members) have facilitated the WV Commission on Residential Placement, the WV Department of Education's Out-of-Home Task Force and has facilitated working groups with A Vision Shared (See Attachment 2). Carl teaches facilitation and has facilitated a number of individual meetings regarding strategic planning with many of those referenced in this bid.

Members of the project team have done training on a regular basis from leadership development to supervisory training in a variety of organizational settings. The majority of training is done from materials developed by CESD. Also, CESD has done leadership training at PDC and Beverage Distributors that is closely aligned with the LEI process.

Vendor must demonstrate experience in strategic planning within the public sector, to include practical experience with executive of plans (implementation processes).

CESD has worked in the past with the Bureau for Public Health (BPH) within WVDHHR to complete a strategic plan and worked with its top leadership team to implement the plan.

CESD also worked with the Office of Epidemiology and Health Promotion, a unit within WVDHHR to do strategic planning to include developing the implementation process through a special team comprised of management and staff. Joe Barker, Director of OEHP can provide more details of our work with his organization. (references - Cathy Slemper at BPH and Joe Barker at OEHP)

CESD has been assisting the WV Healthy Lifestyles Coalition, chaired by First Lady Gayle Manchin, with strategic planning based on the Coalition's legislative mandates and other factors found during the strategic planning process. Copies of this work can be found at their web site or through the Office of Healthy Lifestyles. (Reference – Keri Kennedy)

CESD worked with the Office of Institutional Education Programs (OIEP) within the WV Department of Education to develop a strategic plan for this unit. This work included an extensive process regarding implementation of the action plans based on the multiple year plan. All institutions within OIEP participated in the planning work and its implementation. (Reference Frank Andrews)

Vendor must demonstrate experience specific with large process improvement initiatives involving multiple working groups and associated processing requirements.

CESD has a long history of working with major improvement initiatives that affect a large process (change) factor within the organization. From integrated product development (IPD) projects to the Working Relationship improvement project between BPH and the WV local health departments.

CESD is the organization that developed the processes associated with the now four plus year A Vision Shared initiative, WV's economic development initiative. This effort (see Attachment #2), has over 700 volunteers working on 25 plus teams. Four major steering committees are part of the process. Members of the CESD project team that will be on this project have been working with this major change strategy. Visit www.visionshared.com for more details. (Reference - Scott Rotruck)

Processes for the Comprehensive Behavior Health Commission have been set up and are being facilitated by CESD. The attached diagram (See Attachment #3) shows how the seven working teams support both the Commission and its Advisory Board. CESD helped develop the process and has been providing technical assistance and facilitation to this Legislative mandated state-wide study and recommendations regarding the total behavioral health system. (Reference – Martha Y. Walker)

For the tasks outlined in Request for Quotation #BHS70097 CESD's total bid amount is \$32,500.00.

References

Frank Andrews (retired)
WVDO/OIEP
5331 Westbrook Drive
Charleston, WV 25313
Home – (304) 776-5235

Joe Barker
OEHP
350 Capital Street
Diamond Bldg., Room 206
Charleston, WV 25301-3715
(304) 558- 9103

Keri Kennedy
Office of Healthy Lifestyles
350 Capital Street
Diamond Bldg., Room 206
Charleston, WV 25301-3715
(304) 558-5210

Cathy Slempp
BPH
350 Capital Street, Room 702
Charleston, WV 35201-3712
(304) 558-6900

Scott Rotruck – Chair,
Vision Shared, Inc.
PO Box 6070
Charleston, WV 25362
(304) 685-6109

Martha Y. Walker, Cabinet Secretary
West Virginia Department of Health and Human Resources
1900 Kanawha Blvd. East
Building 3 Room 206
Charleston, WV 25305
(304) 558-7898

Attachment 1 - Biosketches Carl, Holly, Matt, Kim
Attachment 2 Vision Shared diagram
Attachment 3 Diagram for Commission Behavioral Health

Attachment #1

Holly K. Clark

Holly Clark is a Technical Associate of The Center for Entrepreneurial Studies and Development, Inc. (CESD). She is a registered engineer intern. Holly has a Bachelors and Masters degree in Industrial Management and Systems Engineering from West Virginia University and a Diploma of Digital Design from the Art Institute of Pittsburgh. She also is the sole proprietor of Dot Designs, her freelance graphics design business.

She has been with CESD for over six years and has been involved directly with over 50 organizations supported by CESD. Those organizations span manufacturing, healthcare, service, government, and higher education.

Holly has a wide range of project experience. She managed an effort initiated by the West Virginia Roundtable to conduct and analyze a comprehensive survey of over 200 West Virginia employers. She has also developed numerous Microsoft® Access® databases for several of CESD's sponsors.

Holly also fulfills her creative interests by producing the marketing materials used by Career Success Academy™, CESD, Readskills®, and Online Safety Academy™. She has also served as an instructor for the Career Success Academy at West Virginia University.

Holly has developed structured job training manuals for a variety of manufacturers in cooperation with the Governor's Guaranteed Work Force Program and the West Virginia Development Office. She is also in the process of developing a Manufacturing Supervisor's course on Quality Control.

Holly has been involved in conducting numerous research efforts for organizations such as the West Virginia Education Alliance, the West Virginia Division of Natural Resources, Platinum Properties, LLC, and the Claude W. Benedum Foundation.

Holly also serves as CESD's webmaster. Her responsibilities with this duty include project management of all online initiatives at CESD, software and hardware maintenance of the CESD Online Learning Portal, creation of websites that support the online efforts of CESD's clients, and the instruction of others in preparing content for the web.

Holly's areas of interest include business market and feasibility research, database development, organizational learning, workforce development, web and graphic design.

Holly is a native of Keyser, WV, and now lives in Pittsburgh, PA. Holly's personal interests include sewing, reading, traveling, and directing the Grand View Presbyterian Church bell choir.

Carl D. Hadsell

A native of Wheeling, West Virginia, Carl D. Hadsell has been with CESD since 1993. Carl has several focuses within CESD including business development, strategic planning, organizational development, facilitation services and training. Prior to joining CESD, Carl served in administrative roles and provided consulting services to both commercial and non-profit organizations. Dr. Hadsell has a doctoral in education administration with a combined emphasis on information systems and organizational development. Carl's doctorate is rooted in a Master of Business Administration (MBA) and an undergraduate concentration in marketing and management. Since joining CESD, Carl has worked with all sizes of organizations – international to ones operated by small independent entrepreneurs.

Dr. Hadsell is a professional facilitator, both practicing and training in this area. He has a strong background in total quality approaches within organization that use integrated teaming practices and learning strategies to advance their productivity and efficiency. Training capabilities include leadership skills, teaming, integrated product development, process tools, facilitation, strategic planning, and business analysis. He has developed process tools and other material used in facilitation sessions, problem solving, or process improvement initiatives. Carl has personal interests in stock investments (since buying a share of stock for a high school business class), boating, and creative activities from landscaping to writing children stories.

Kim Spangler

Kim joined CESD in August 1996 as an Industrial Engineer/Professional Associate. Kim has been involved in a variety of different projects with over 50 organizations in manufacturing, service, healthcare, technology and government. Her areas of emphasis include workforce development, training systems, and organizational development.

Kim graduated magna cum laude from West Virginia University with a Bachelor of Science in Industrial Engineering in 1994. She also holds a Master of Science in Industrial Engineering from West Virginia University.

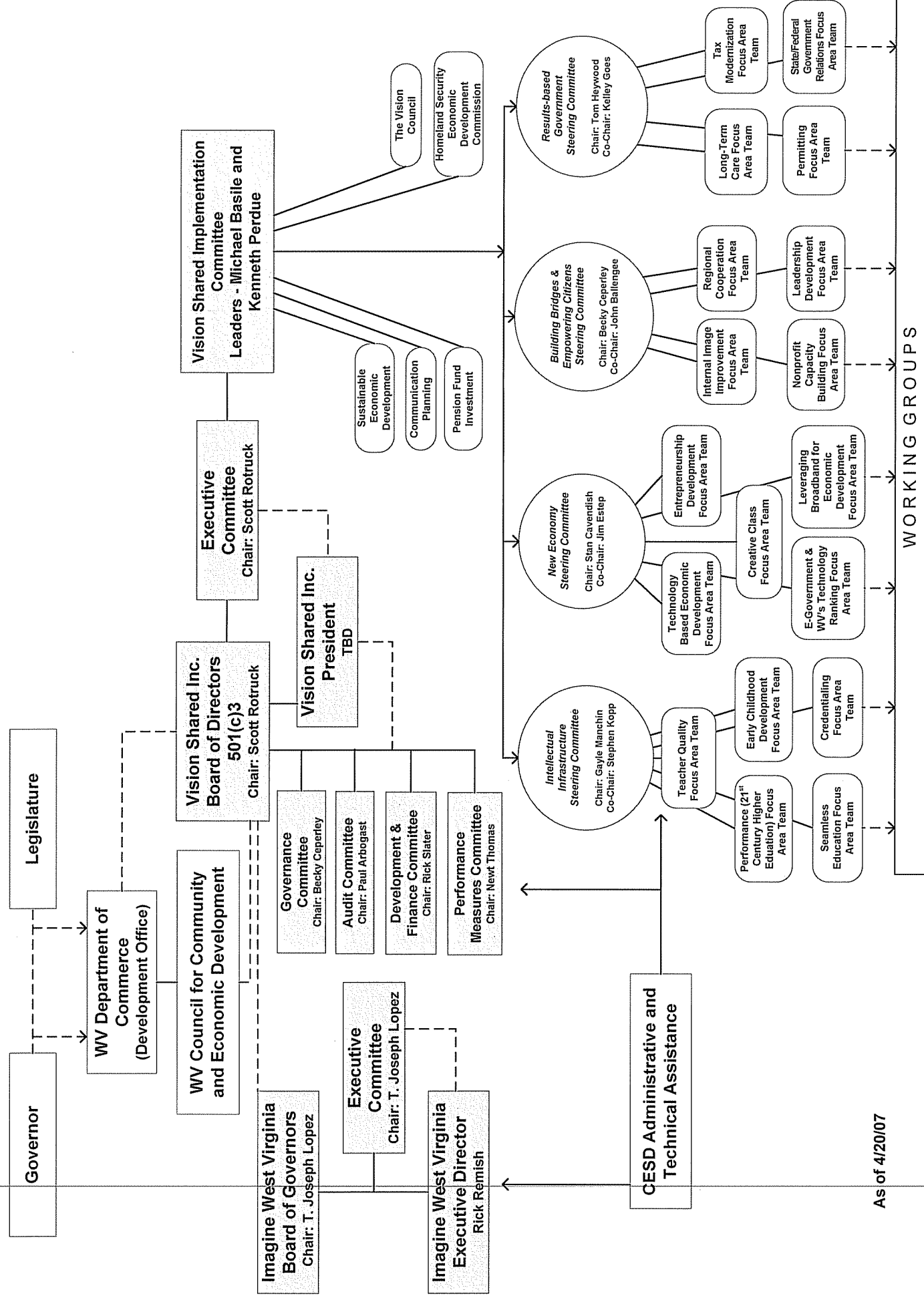
Kim was born and raised in Fairmont, WV, and now resides in Vandalia, West Virginia, just minutes from Stonewall Jackson Lake. She and her husband, Mike, have three children, Emilee, Makenna, and Owen.

Matt West

Matt joined CESD in July of 2006. Prior to joining CESD, he held a progression of technical and leadership positions for General Electric in the United States and Europe and is a graduate of their esteemed Operations Management Leadership Program. His expertise is in operations management, Six Sigma, and Lean Operations. Aside from operations, he has an interest in technology strategy and commercialization. Matt graduated summa cum laude from West Virginia University with a Bachelor of Science in Industrial Engineering and will receive a MBA from Duke University's Fuqua School of Business in May 2007.

Matt is also the founder and President of iHealth Solutions, which creates and applies innovative solutions to improve the efficiency and effectiveness of the personalized, preventive and predictive healthcare markets.

West Virginia: A Vision Shared Organizational Structure and Operations



State of West Virginia
Comprehensive Behavioral Health Commission

Organizational Overview

