



Revision / Development of the Policies and Procedures Manual for Workforce West Virginia



*Due by 1:30 p.m.,
February 19, 2009*

RFQ Number WWV09852 - - Buyer 44

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

Attention:
Frank Whittaker
304-558-2316

HeiTech Services, Inc.
8201 Corporate Drive, Suite 600
Landover, MD 20785
Telephone: 301 918-9500
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www.heitechservices.com
DUNS 119756240

Heidi W. Gerding, President/CEO
301 918-9500, ext. 106
heidi@heitechservices.com

**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 fee.
5. 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.
6. Payment may only be made after the delivery and acceptance of goods or services.
7. Interest may be paid for late payment in accordance with the *West Virginia Code*.
8. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, this Contract may be deemed null and void, and terminated without further order.
14. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
15. **WEST VIRGINIA ALCOHOL & DRUG-FREE WORKPLACE ACT:** If this Contract constitutes a public improvement construction contract as set forth in Article 1D, Chapter 21 of the West Virginia Code ("The West Virginia Alcohol and Drug-Free Workplace Act"), then the following language shall hereby become part of this Contract: "The contractor and its subcontractors shall implement and maintain a written drug-free workplace policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act, as set forth in Article 1D, Chapter 21 of the West Virginia Code. The contractor and its subcontractors shall provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free work place policy in compliance with the West Virginia and Drug-Free Workplace Act. It is understood and agreed that this Contract shall be cancelled by the awarding authority if the Contractor: 1) Fails to implement its drug-free workplace policy; 2) Fails to provide information regarding implementation of the contractor's drug-free workplace policy at the request of the public authority; or 3) Provides to the public authority false information regarding the contractor's drug-free workplace policy."

INSTRUCTIONS TO BIDDERS

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



8201 Corporate Drive, Suite 600
Landover, Maryland 20785
(301) 918-9500
Fax (301) 459-4263

February 18, 2009

State of West Virginia
Department of Administration
Purchasing Division
Building 15
2019 Washington Street, East
Charleston, WV 25305-0130

Attention: Mr. Frank Whittaker

Subject: RFQ WWV09852

Dear Mr. Whittaker:

HeiTech Services, Inc. is pleased to submit our response to your RFQ Number WWV09852, *Revise / Develop the Policies and Procedures Manual for Workforce West Virginia in Accordance with Federal Department of Labor Requirements*. HeiTech Services offers the State of West Virginia the benefits of our substantial understanding and experience with federal requirements for State Workforce Agencies, and our proposed project staff includes several recently retired Department of Labor senior executives.

Our offer remains valid for 30 days. If you and your program team have any questions, or would like any further information, please contact me at 301 918-9500, extension 142, by fax at 301 459-4263, or by email at agoddard@heitechservices.com.

Sincerely,

A handwritten signature in black ink, appearing to read 'Anna Goddard', is written over a horizontal line.

Anna Goddard
Vice President

Honor, Excellence, & Innovation

www.heitechservices.com

SEALED BID

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Executive Summary

HeiTech Services, Inc. offers the West Virginia Bureau of Employment Programs the benefits of extensive understanding and experience with U.S. Department of Labor (DOL) requirements for State Workforce Agencies and related federal grants management requirements, policies, and procedures. With over ten years of directly related DOL contracts and an experienced staff that includes former DOL senior executives, we can assure Workforce West Virginia of a comprehensive and knowledgeable review of Workforce West Virginia's policies and procedures that will result in the development of a robust and compliant policies and procedures manual.

HeiTech Services' proposed staff for this effort brings an unparalleled body of knowledge and experience to Workforce West Virginia's disposal. Each of the three key personnel listed below have prepared administrative policies and procedures as well as reviewed state procedures in the course of their assignments. They include:

Norman Baillie – 29 years experience with DOL, most recently as Manager, Discretionary Grants and Manager, Office of Finance and Administrative Services for ETA's Philadelphia Region. Mr. Baillie also was program manager of the national Earmark Center overseeing earmark grants throughout the country.

Lance Grubb – 40 years experience with DOL and other Federal agencies. As Deputy Administrator of the Office of Financial and Administrative Management and ETA Chief Procurement Official, Mr. Grubb was responsible for all phases of award and management of ETA's \$10 billion annual procurement and grants budget.

Jessica Aragon – Six years experience administering Workforce Investment Act, Trade Act programs and One-Stop Career Centers at the state level (Puerto Rico), as well as federal grants administration and compliance work.

Our project staff will work under the direction of HeiTech Services Vice President, **Anna Goddard**, a former Administrator of the DOL Office of Financial and Administrative Management. As a member of the Federal Senior Executive Service, Ms. Goddard held several high level leadership positions such as the Regional Administrator for the ETA Region 3 - Atlanta and Region 2 – Philadelphia. With federal, state and local partners, she was responsible for managing and directing workforce development activities within these regions. Other positions with field experience have included the Director of the Office of National Programs, Deputy Director of the United States Employment Service and Deputy Administrator, Office of Regional Management.

HeiTech Services has other former ETA management staff available who can provide support to this team including: **Jack Rapport** and **Michael Brauser**. Mr. Rapport is a Certified Public Accountant and former Administrator of ETA's Office of Field Operation and its Office of Financial and Administrative Management. Prior to these executive level positions, he served as ETA's Comptroller responsible for all ETA budgeting and accounting. Mr. Brauser is a former ETA Regional Administrator and State of Idaho employee.



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Through our work with State Workforce Agencies and other state and local federal grantees on a number of DOL contracts, HeiTech Services has gained unique insight into the workforce development needs at the state and national levels. Some of these include:

- Analysis of policies and procedures for DOL grants management and funds stewardship including the documentation of procedures for managing grants throughout the entire grants lifecycle.
- A study of initial Internet Unemployment Insurance claims among six State Workforce Agencies.
- An evaluation of the Unemployment Insurance PERFORMS management system at the federal and state levels.
- Training and technical assistance to DOL earmark grantees, including development of two reference manuals.
- Development of a reference manual on conducting agricultural wage data among all 50 states.
- Providing policy and procedures training to federal grants officers.

<p>About HeiTech Services</p> <ul style="list-style-type: none"> ✓ Founded in 1999 ✓ Nearly 10 years experience supporting U.S. Department of Labor workforce programs. ✓ In-depth knowledge of federal requirements for State Workforce Agencies ✓ Senior staff with recent DOL executive experience ✓ Staff with experience working closely with State Work Agencies (SWA) ✓ Core business strength in policy analysis and development ✓ SBA-certified as a Small Disadvantaged Business and 8(a) ✓ Woman Owned ✓ Service Disabled Veteran Owned ✓ Approximately \$22M revenue in 2008

HeiTech Services' unmatched corporate and staff expertise in federal workforce program requirements will assure Workforce West Virginia of a thorough review and analysis of policies and procedures, as well as timely delivery of a complete and compliant policy and procedures manual. At approximately \$22 million in 2008 revenue, HeiTech Services is big enough to be financially stable, and to have sufficient resources for contingencies, yet small enough to provide executive-level attention to detail and to assure Workforce West Virginia's satisfaction.

Company Resume

HeiTech Services got its name because its President and CEO, Heidi Gerding, a Naval Academy graduate, wanted to put her name and reputation on the line. The company was founded in 1999 by Ms. Gerding and Executive Vice President, Jim Clement, and has grown to approximately \$22 million in 2008 sales, with over 400 employees supporting government contracts, primarily with the U. S. Department of Labor (DOL).

HeiTech Services' core business strengths include policy analysis and development, information technology services, and professional and administrative support services. Our growth and success has come from delivering the highest levels of quality service, resulting in

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repeat business from satisfied customers such as DOL, as well as the Departments of Health and Human Services, Transportation, Commerce, Homeland Security, and the EPA.

Our relevant contract experiences described below demonstrate our understanding of the issues facing Workforce West Virginia and our ability to address them successfully. These contracts are all at the federal level, and clearly provide evidence of equivalence to having performed services of similar scope and content for state government.

Technical Assistance for Earmark and Other WIA Discretionary Grantees - HeiTech Services was contracted by the DOL's Employment Training Administration (ETA) to provide logistical and training support services and technical assistance to Earmark and other Workforce Investment Act (WIA) discretionary grantees in 1) developing project proposals with measurable program outcomes; 2) integrating these projects into the WIA system and regional economies; 3) sustaining the projects beyond the end of the grant period; and 4) budget preparation and financial management. Original tasks included working with the Philadelphia Earmark Center (PEC) to plan and conduct training and technical assistance conferences for the earmark grantees that were to receive funding during FY 2007. An additional task was to review and update the training materials that are provided to the grantees to assist them in developing their grant proposals. The project team initially reviewed the material and subsequently contacted PEC liaisons in each of the regional offices to obtain their feedback on the materials and the program in general.

Grants Management and Fund Stewardship Activities Analysis

Under this contract, HeiTech Services worked closely with an ETA transformational team to develop and execute strategies to achieve a more coordinated, efficient, and effective grant management system. HeiTech Services' significant experience with ETA's operations, as well as an understanding of their transformation initiative, allowed us to offer technical advice, assist the agency with strategic design of products, and implement deliverables effectively and timely. Specifically, HeiTech Services provided the following support to ETA in their effort to transform the agency's primary mission-oriented business function – grant management:

- Facilitated the completion of business process mapping to analyze the current processes and identify opportunities for system enhancements and alignment. The Team identified critical gaps and inefficiencies in the current grant management processes, thus driving the development of a transformed grant management strategy.
- Assisted the Innovate ETA (IETA) Grants and Performance Management Team in strategic planning and development of a transformed grant management strategy. As a result, ETA has a coordinated strategy for transformation of its grant management system into a series of interconnected, efficient processes that support coordination and information-sharing across the agency.
- Supported the development and execution of a communications strategy to inform the ETA Executive Steering Council regarding the Team's grant management transformation proposal. Specific functions included communications planning, preparation of presentations, fact sheets, and diagrams. The Executive Steering Council readily approved the strategy and initiated plan implementation.



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- Collaboratively spearheaded the development and refinement of grant management policy through the revision of the agency's official directive regarding grant execution, administration, and close-out. Project staff worked closely with key ETA staff to document the various roles and responsibilities and presented ETA with a revised Employment & Training Order reflecting the agency's updated guiding principles, policies, and procedures.
- As a follow-on to the Employment & Training Order, HeiTech Services was tasked under this contract to update the ETA Grants Management Desk Reference Guide which provides specific and detailed information on the roles and responsibilities for grants management staff throughout the life cycle of the grant process and DOL and Federal requirements.

UI Internet Initial Claims (IIC) Study

HeiTech Services studied the IIC process in six states selected to accurately reflect variations in size and geography (Colorado, Missouri, North Carolina, Pennsylvania, Utah, and Washington). Realizing that obtaining buy-in from each of the states proposed for the pilot would be difficult given their limited resources to devote to the project, we worked closely with senior management at each SWA to ensure that the site visits and data collection requests would require a minimal amount of time and resources on their part. By maintaining regular contact with each of the pilot-site states, we were able to obtain all of the required data with no additional cost to DOL. The Study Design phase of the project consisted of three levels of data collection tasks. Upon approval of the Study Design, we performed background research on IIC initiatives among the 32 states that had implemented such systems to obtain a baseline of information.

Native American Workforce Investment Act Automated Reporting Software

ETA's Division of Indian and Native American Programs (DINAP) hired HeiTech Services to develop a second generation program reporting, case management and recordkeeping system for tracking grantee progress against a set of common performance measures. This application is called "Bear Tracks II."



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References

Reference 1

Contract Title: Professional and Administrative Management Support - Technical Assistance for Earmarks and other WIA Discretionary Grantees

Customer Agency: U.S. Department of Labor, Employment and Training Administration

Point of Contact:

Name: Ms. Chantal Watler **Title:** Philadelphia Earmark Center Coordinator

Phone: 215-861-5224 **email:** watler.chantal@dol.gov

Mailing Address:

U.S. Department of Labor
Employment Training Administration
Suite 825 East
170 S. Independence Mall West.
Philadelphia, PA. 19106

Reference 2

Contract Title: Professional and Administrative Management Support – Analysis of Internet Initial Claims

Customer Agency: U.S. Department of Labor, Employment and Training Administration

Point of Contact:

Name: Ms. Diane Wood **Title:** Program Analyst

Phone: 202-693-3212 **eMail:** wood.diane@dol.gov

Mailing Address:

U.S. Department of Labor
Employment Training Administration
Frances Perkins Building
200 Constitution Ave., NW, Room S4231
Washington, DC 20210



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Methodology

Below we present a brief discussion of the steps HeiTech Services will take to review, document, and revise policies and procedures to ensure they comply with DOL ETA requirements.

Task 1: Kickoff Meeting – week of March 2, 2009

Lance Grubb, Norman Baillie, and Jessica Aragon will meet with officials of WorkforceWV. Goals for this meeting will be (1) to discuss and clarify requirements and expectations; (2) review and agree upon a project schedule, including access to staff during potential on site visit(s); and (3) meet with key staff.

Task 2: Evaluate existing policies and procedures – week of March 2 to April 8

HeiTech Services representatives will identify and assess existing documentation, including all current as well as any ad hoc or de facto procedures and policies during this period. Key activities include:

- Review documentation of existing policies and procedures and any applicable federal or state audit(s) or reviews March 9 - 27
- Staff interviews – March 30 - April 3
- Gap assessment— April 6 - 8

Task 3: Develop Draft Manual and Flow Charts— April 9 - May 4

Using information gathered from existing documentation and staff interviews, HeiTech representatives will develop a new draft policies and procedures manual and flow charts of key processes.

Task 4: State Review of Draft -- May 4-8

HeiTech representatives Lance Grubb, Norman Baillie and Jessica Aragon meet with state officials and key staff to review draft manual and flow charts. –week of May 4

WV key staff review and comment by May 8

Task 5: Final revisions – May 11-22

HeiTech representatives will review State comments, adjust the draft as appropriate and finalize the manual – May 12-22

Task 6: Delivery & close-out

Deliver the finalized policies and procedures manual, flow charts, and copies – week of May 25.



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Project Staff Resumes

Norman Baillie
Program Manager

Summary of Experience:

Mr. Baillie has extensive experience in financial, grants, administrative, personnel, performance and program management. He has a successful background in financial management including the preparation and oversight of operating budgets, financial statements and grant portfolio in excess of \$400 million. Mr. Baillie possesses extensive accomplishments examining and enhancing administrative systems and processes. He has expert knowledge and experience in all phases of federal grants management, and possesses considerable experience and accomplishments developing, implementing and administering employment and training programs for the mid-Atlantic region. Mr. Baillie has excellent interpersonal, communications, and leadership skills acquired over a thirty seven year career. Mr. Baillie has extensive experience managing multiple projects, teams, including national collective bargaining experience.

Education

M.B.A., University of Delaware, 1973
B.S., Business Administration, 1970

Professional Experience

U.S. Department of Labor, 2001 – 2008
Employment Training Administration
Manager, Discretionary Grants

Mr. Baillie served as Manager for Discretionary Grants with responsibility for providing leadership and direction for the Employment and Training Administration (ETA) in Philadelphia, PA. He led a staff of 10-15 and grant portfolio of \$400+ million, national manager for ETA earmark grants, and developed "Back to Basics" a series of grants management guides and tutorials for discretionary grantees. Mr. Baillie also held temporary assignments as Regional Administrator and Comptroller for ETA.

U.S. Department of Labor, 1991 – 2001
Employment Training Administration
Manager, Office of Finance and Administrative Services

Serving as Manager, Mr. Baillie managed a diverse IT, MIS, financial and administrative staff in support of state and local grantees and other regional staff. This included managing the regional office budget, providing personnel advice and guidance to regional office managers and supervisors. He provided training for state and local grantees and served as the management partner in an agency-wide union management pair effort under an agency partnership initiative.

U.S. Department of Labor, 1985 – 1991
Office of Assistant Secretary for Administration and Management
Financial Manager



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Mr. Baillie was responsible for the management and oversight of accounting, payroll, accounts payable and receivables for all Department of Labor (DOL) agencies in the mid-Atlantic region. This included managing regional office implementation of DOL Accounting and Related Systems (DOLARS) – a new accounting system.

**U.S. Department of Labor,
Office of Assistant Secretary for Administration and Management**
Supervisor, Staffing Services, and Personnel Officer

1979 – 1985

As staffing supervisor, Mr. Baillie managed internal staffing, college and other recruitment for the Office of Assistant Secretary for Administration and Management (OASAM) regional office. He conducted reductions in workforce in 1982-1984 affecting over 1,000 employees, and testified before MSPB on all appeals. While serving as Personnel Officer, from 1982-1984, he provided labor and employee relations, staffing services, benefits information and classification services to over 400 supervisors and 3,000 employees located in the mid-Atlantic region. Mr. Baillie personally provided training on a new performance appraisal system implemented in the Department. He also served as a member of management's national negotiating team bargaining a new collective bargaining agreement.



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Lance Grubb
Project Manager

Summary of Experience

Mr. Grubb has over forty years of professional and management experience in financial management and accounting, procurement, grants management, research and policy analysis with the U.S. Department of Labor, Employment and Training Administration (ETA) and other federal agencies. Mr. Grubb has proven to be a tremendous asset throughout his career while serving in several positions from economist and legislative analyst to program policy analyst. He has consistently led agency initiatives to include streamlining and automating procurements and regulating the complete grant award process. Mr. Grubb was heavily involved in reducing procurement and grant award processing time by record numbers while working in the Office of Grants and Contracts Management. He participated in numerous noteworthy economic studies for both the Office of Federal Contract Compliance (OFCCP) and the Equal Employment Opportunity Commission (EEOC).

Education

B.A., Economics, Otterbein College, May 1967,
MBA, Management, Virginia Tech, May 1978

* Has completed numerous graduate and professional development courses in accounting, economics, finance, management, and procurement.

Professional Experience

HeiTech Services, Inc.
Senior Program Manager

November 2007 -- Present

Within the Management Consulting and Program Support Division of HeiTech Services, Mr. Grubb serves as a senior program manager on various projects, particularly those with the Department of Labor (DOL). With his background at DOL, his areas of expertise are grants and contracts management, fiscal policy and procurement policies and procedures. He has provided direct technical assistance to federal and grantee staff in these areas. He has also developed technical assistance guides for DOL Ear Mark and other Discretionary Grantees and participated in the development of web-based training modules in the above areas. He has served as a subject matter expert for the Federal Project Officer Training Project and the Grants Management and Stewardship project. Mr. Grubb also contributes significantly in the business development activities for HeiTech Services.

U.S Department of Labor
Employment and Training Administration

1982-2007

Office of Financial and Administrative Management and ETA Chief Procurement Official –
As *Deputy Administrator*, Mr. Grubb was responsible for all phases of award and management of ETA's \$10 billion annual procurement and grants budget. He led agency initiatives to streamline and automate procurement and grant pre-award, award, post-award and closeout processes. He also led the Department of Labor and ETA's participation in government-wide procurement and grant streamlining initiatives. Mr. Grubb was responsible for all agency back-



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office administrative functions.

Office of Grants and Contracts Management and ETA Chief Procurement Official –
As *Director*, Mr. Grubb was responsible for the day-to-day management of all phases of ETA's \$10 billion procurement and grants budget. He began efforts to streamline and automate procurement and grant award processes while steadily reducing procurement and grant award processing time by one-third and closeout processing time by one-half. Mr. Grubb oversaw a 50% expansion in the number of procurements and grants awarded annually.

Division of Audit, Closeout and Appeals Resolution - As *Chief*, Mr. Grubb managed the closeout and resolution of all audit exceptions for ETA procurements and grants, including participation in litigation cases and settlement negotiations. He managed the closeout of the CETA and JTPA job training programs.

U.S Department of Labor **1977–1982**
Employment and Training Administration

Branch of Research and Analysis, United States Employment Service - While serving as *Chief*, Mr. Grubb managed the collection and analysis of a wide variety of economic, workload and outcome data. He conducted on-site reviews of program operations and made recommendations for improvements and/or policy changes to senior management.

United States Employment Service and Office of Field Operations - As *Program/Policy Analyst*, Mr. Grubb reviewed, wrote, and revised agency management and program policy directives, managed \$5 million Employment Service technical assistance, and training budget.

U.S Department of Labor **1967 – 1977**
Employment and Training Administration

Over the course of a ten year period, Mr. Grubb worked at the Equal Employment Opportunity Commission, Office of Federal Contract Compliance, and Wage-Hour Division, where he held a variety positions from economist to legislative analyst, and program policy analyst. He participated in the development of OFCCP Revised Order #4 and numerous adverse impact economic studies for both OFCCP and the EEOC.



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Jessica M. Aragon

Senior Analyst

Summary of Experience

Ms. Aragon has vast understanding of business development, marketing and business operations for large institutions. She has excellent organizational and time management skills. Ms. Aragon's past work history includes developing various marketing materials, grants, work plans, press releases, and training activities. Some of her work includes managing large events for the industries she served. Ms. Aragon is a confident communicator, who is committed to quality, thrives under pressure and has excellent analytical skills, including proficiency in Word, PowerPoint, Publisher, Excel, Outlook, and fully bilingual in English and Spanish.

Education

B.A., Communications concentration in Public Relations with a minor in Spanish, George Mason University, 2001

Professional Experience

HeiTech Services, Inc.
Senior Analyst

December 2008-Present

Ms. Aragon provides program support to current projects within the Management Consulting and Program Support Division. Some of her experience includes analyzing and reviewing a variety of work plans and quality assurance plans for the Office of Foreign Labor Certification (OFLC) of the Department of Labor's Employment and Training Administration. Her work also includes providing recommendations on day to day operations and procedures to Program Managers at the National Processing Centers of the OFLC.

Camp, Dresser and McKee, Inc., Fort Lauderdale, FL
Management Consulting Division, Area Administrative Manager

April 2007- December 2008

Ms. Aragon assisted with new business development, marketing and business operations throughout south Florida and the Caribbean. She provided operational support to the Senior Vice President/Area Manager in charge of signing over \$60 million annually in new business for south Florida. Her work included communicating firm-wide and regional initiatives to the south Florida management team by writing and revising e-mails, memorandums and presentations. Ms. Aragon also managed area offices by ensuring they are operating efficiently by monitoring and controlling overhead and new business expenses. In addition, she provided leadership and mentoring to a staff of 15 professionals throughout six offices in south Florida and Caribbean, identified necessary trainings in order to ensure quality control standards were met, and staff met utilization target goals, including conducting annual appraisals and goal setting for the upcoming year.



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**Human Resources and Occupational Development Council,
Department of Labor and Human Resources, San Juan, PR
Special Advisor**

July 2001 to March 2007

At the Council, Ms. Aragon assisted the Executive Director in the administration of Employment and Training funds in Puerto Rico. She served as the Executive Director's liaison with the federal government and local entities ensuring local Workforce Investment Act and Trade Act programs complied with federal laws and regulations, including employment and training activities under the Workforce Investment Act for the 78 municipalities in Puerto Rico and developed appropriate marketing strategies to promote services on the island. Ms. Aragon produced marketing materials for Workforce Investment Act and Trade Act programs in Puerto Rico in both English and Spanish that were distributed to the general public and at One-Stop Career Center locations. In addition, Ms. Aragon responsibilities included planning the Workforce Investment Act Annual Conference for approximately 400 attendees including representatives from the federal government and local entities, managing the coordination of onsite logistics, marketing efforts, and identifying program speakers to share best practices recognized throughout the U.S. She supervised a staff of 6 professionals from the Communications and Public Relations office to ensure local media coverage on Department initiatives, reviewed and edited press releases, announcements and advertisements in English and Spanish for local media and public, including organizing press conferences for both the Executive Director and the Secretary of the Puerto Rico Department of Labor. Ms. Aragon also developed and implemented the Trade Act program in Puerto Rico, trained personnel from 15 offices covering the 78 municipalities in order to provide employment services to dislocated workers on the island, and provided on-site consultations to One-Stop Career Centers to ensure successful implementation of the program.



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

Request for Quotation

RFO NUMBER
WWV09852

PAGE
1

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

VENDOR

HeiTech Services, Inc.
 8201 Corporate Drive, Suite 600
 Landover, MD 20785

SHIP TO

BUREAU OF EMPLOYMENT PROGRAMS
 OFFICE OF ADMIN. SUPPORT-5302
 112 CALIFORNIA AVENUE
 CHARLESTON, WV
 25305-0112 558-2634

DATE PRINTED 02/04/2009	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
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BID OPENING DATE: **02/19/2009** BID OPENING TIME **01:30PM**

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		961-20	\$99,999.93	\$99,999.93
<p>CONSULTING</p> <p>THE WEST VIRGINIA PURCHASING DIVISION, FOR THE AGENCY, WORK FORCE WEST VIRGINIA, IS SOLICITING BIDS FROM QUALIFIED FIRMS TO REVISE/DEVELOP THE POLICIES AND PROCEDURES MANUAL FOR WORKFORCE WEST VIRGINIA IN ACCORDANCE WITH FEDERAL DEPARTMENT OF LABOR REQUIREMENTS AND THE ATTACHED BID SPECIFICATIONS.</p> <p>EXHIBIT 3</p> <p>LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE ON AND EXTENDS THROUGH JUNE 1, 2009</p> <p>CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THIS CONTRACT MAY BE DEEMED NULL AND VOID, AND TERMINATED 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</p>						

RECEIVED

2009 FEB 19 A 8:13

PURCHASING DIVISION
STATE OF WV

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Ann Gorkovsk</i>	TELEPHONE 301 918-9500	DATE FEB. 19, 2009
TITLE VICE PRESIDENT	FEIN 52-2197016	ADDRESS CHANGES TO BE NOTED ABOVE

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



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
WWV09852

PAGE
3

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

VENDOR

RFQ COPY
 TYPE NAME/ADDRESS HERE
HEI TECH SERVICES, INC.
8201 CORPORATE DRIVE, SUITE 600
LANDOVER, MD 20785

SHIP TO

BUREAU OF EMPLOYMENT PROGRAMS
 OFFICE OF ADMIN. SUPPORT-5302
 112 CALIFORNIA AVENUE
 CHARLESTON, WV
 25305-0112 558-2634

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
02/04/2009				

BID OPENING DATE: **02/19/2009** BID OPENING TIME **01:30PM**

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
***** THIS IS THE END OF RFQ WWV09852 ***** TOTAL:						<u>\$99,999.93</u>

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Alan Goddard</i>	TELEPHONE 301 918-9500	DATE FEB, 19, 2009
TITLE VICE PRESIDENT	FEIN 52-2197016	ADDRESS CHANGES TO BE NOTED ABOVE

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

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

VENDOR OWING A DEBT TO THE STATE:

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

PUBLIC IMPROVEMENT CONTRACTS & DRUG-FREE WORKPLACE ACT:

If this is a solicitation for a public improvement construction contract, the vendor, by its signature below, affirms that it has a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the *West Virginia Code*. The vendor **must** make said affirmation with its bid submission. Further, public improvement construction contract may not be awarded to a vendor who does not have a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the *West Virginia Code* and who has not submitted that plan to the appropriate contracting authority in timely fashion. For a vendor who is a subcontractor, compliance with Section 5, Article 1D, Chapter 21 of the *West Virginia Code* may take place before their work on the public improvement is begun.

ANTITRUST:

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

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

LICENSING:

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

CONFIDENTIALITY:

The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. 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>.

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.

Vendor's Name: HEI TECH SERVICES INC.

Authorized Signature: [Signature] Date: FEB. 19, 2009



Revision / Development of the Policies and Procedures Manual for Workforce West Virginia

Budget

Labor Category	Staff	Rate	Hours	Cost
Project Manager	N. Baillie	\$129.63	220	\$28,518.60
Project Manager	L. Grubb	\$142.59	220	\$31,369.80
Research Associate	J. Aragon	\$78.76	270	\$21,265.20
Graphics Designer	R. Zebina	\$87.85	40	\$3,514.00
Administrative Assistant	TBD	\$42.72	16	\$683.52
Total Labor				\$85,351.12

Travel

	Unit Cost		
Airfare (round trip)	\$285.00	8	\$2,280.00
Hotel (per night)	\$120.00	19	\$2,280.00
Car rental (per trip)	\$231.00	2	\$462.00
Per Diem (full day)	\$44.00	11	\$484.00
Per Diem (half day)	\$33.00	16	\$528.00
Total Travel			\$6,034.00
G&A on Travel	20.01%		\$1,207.40
Cost before Fee:			\$92,592.52
Fee:	8%		\$7,407.40
Total Cost:			\$99,999.93

Travel Assumptions: 3 trips to Charleston, WV.

This offer remains valid for 30 days.



Revision / Development of the Policies and Procedures Manual for Workforce West Virginia

Work Breakdown Structure

		Baillie	Grubb	Aragon	Zebina	Admin. Assistant
Task 1	Meet with WV Officials	8	8	10		
	Identify key division functions to be covered					
	Collect existing documentation					
	Clarify expectations for final products					
Task 2	Review documentation	40	40	40	20	
	Review all available documentation					
	Prepare preliminary workflow diagrams					
Task 3	Site Visits	80	80	80		
	Meet with state officials to validate prepared workflow diagrams					
	Obtain information to prepare diagrams for all key functions in those areas in which there is no documentation					
Task 4	Prepare Written Policies and Procedures	52	52	60		
	Based upon approved diagrams, rewrite or prepare written policies and procedures					
Task 5	Deliver Final Report/Compilation of Written Procedures	40	40	80	20	16
	Produce and deliver 30 copies (printed and bound) of complete compilation of policies, procedures, and flowcharts for the entire FAM Division					
	Produce and deliver 30 copies (printed and bound) of the compilation of policies, procedures, and flowcharts by section					
	Provide one of each in electronic format in MS Word					
TOTALS		220	220	270	40	16