



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
WWV10860

PAGE
1

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

RFO COPY

VENDOR

**Planmatics Incorporated**  
 1375 Piccard Drive, Suite 150  
 Rockville, MD 20850

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
08/05/2009				

BID OPENING DATE: 09/10/2009 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		961-20		\$ 32,696.18
<p>CONSULTING (NOT OTHERWISE CLASSIFIED)</p> <p>THE WEST VIRGINIA PURCHASING DIVISION, FOR THE AGENCY, WORKFORCE WEST VIRGINIA, IS SOLICITING BIDS FROM RESPONSIBLE VENDORS TO REVISE/DEVELOP POLICIES AND PROCEDURES FOR SAID DIVISION IN ACCORDANCE WITH FEDERAL DEPARTMENT OF LABOR REQUIREMENTS PURSUANT TO THE ATTACHED SPECIFICATIONS.</p> <p>ALL TECHNICAL QUESTIONS MUST BE SUBMITTED IN WRITING TO FRANK WHITTAKER IN THE PURCHASING DIVISION VIA EMAIL AT FRANK.M.WHITTAKER@WV.GOV OR VIA FAX AT 304-558-4115. DEADLINE FOR TECHNICAL QUESTIONS IS 08/18/09 AT 4:00 P ALL TTECHNICAL QUESTIONS WILL BE ADDRESSED BY ADDENDUM AFTER THE DEADLINE.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p> <p>NOTICE</p> <p>A SIGNED BID MUST BE SUBMITTED TO:</p> <p>DEPARTMENT OF ADMINISTRATION          PURCHASING DIVISION          BUILDING 15          2019 WASHINGTON STREET, EAST          CHARLESTON, WV 25305-0130</p>						

RECEIVED  
 2009 AUG 31 AM 9:43  
 WV PURCHASING DIVISION

SEE REVERSE SIDE FOR TERMS AND CONDITIONS			
SIGNATURE	TELEPHONE	DATE	
<i>Lalith de Silva</i>	240-404-0356	8.25.09	
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE	
Vice President	52-180-2422		

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 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, the State may deem this contract null and void, and terminate such contract 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."

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**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



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 Department of Administration  
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<p>THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:</p> <p>SEALED BID</p> <p>BUYER: 44</p> <p>RFQ. NO.: WWV10860</p> <p>BID OPENING DATE: 09/10/2009</p> <p>BID OPENING TIME: 1:30 PM</p> <p>PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID: 301 987 7423</p> <p>-----</p> <p>CONTACT PERSON (PLEASE PRINT CLEARLY): LALITH DE SILVA</p> <p>-----</p> <p>E Mail: ldesilva@planmatics.com</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS		
SIGNATURE <i>Lalith de Silva</i>	TELEPHONE 240-404-0356	DATE 8-25-09
TITLE Vice President	FEIN 52-180-2422	ADDRESS CHANGES TO BE NOTED ABOVE

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***** THIS IS THE END OF RFQ WWV10860 ***** TOTAL:						32,696.18

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>halith de S...</i>	TELEPHONE 240 404 0356	DATE 8.25.09
TITLE Vice President	FEIN 52-1802422	ADDRESS CHANGES TO BE NOTED ABOVE

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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: Planmatics Inc.  
Authorized Signature: Latith de Sib Date: 8-25-09

**Proposal for State of West Virginia, Work Force West Virginia – Review, Revise/Develop the Policies & Procedures of the Fiscal and Administrative Management (FAM) Division**

**Corporate Resume for Planmatics Inc.**

Workforce West Virginia requires a contractor to assist the agency to review the existing policies and procedures of each unit of the Fiscal and Administrative Management (FAM) Division, revise or develop new policies and procedures where necessary, and develop flow charts of the functions to comply with United States Department of Labor's (USDOL) requirements.

Planmatics is well versed in USDOL's requirements for state and local government operations in the areas of fiscal and administrative management of WIA programs, how these requirements are being implemented, and the processes and procedures that must be in place to ensure that local areas adhere to the requirements and rules. Since 1998, Planmatics has provided monitoring and evaluation as well as technical assistance and oversight for financial and administrative requirements of many USDOL Employment and Training Administration (ETA) funded programs under WIA to numerous organizations as a contractor to the ETA. We are very familiar with the technical aspects of the financial and administrative requirements as set out in the Financial Management Technical Assistance Guide and the oversight review guide produced by USDOL. We are very confident that we can easily meet the requirements of this solicitation and in fact, surpass your expectations.

In 2008, Planmatics conducted a study in West Virginia which demonstrates our knowledge, familiarity and experience in fulfilling the requirements specified in this requisition. The following tasks were completed: (1) provided on-site review and on-site technical assistance and monitoring in the seven local Workforce Investment Areas, (2) provided on-site review of the processes and procedures of the state to ensure that local areas adhered to USDOL's fiscal and administrative requirements and rules, (3) identified areas where new policies and procedures needed to be developed, (4) prepared a report of the activities which were incorporated into the federal report to the State of West Virginia, and (5) conducted a briefing to the Department of Labor's federal and regional staff and state and local staff in West Virginia.

Two other examples of working with federally funded, state programs include projects with the Navajo Nation's (NN) Department of Workforce Development and the California Human Development Corporation (CHDC). In 2002, Planmatics worked with the NN Department of Workforce Development<sup>1</sup> after it was decentralized and the various responsibilities were assigned to five separate agencies that are geographically dispersed and maintain separate reporting systems. The Workforce Development Agency requested assistance to review the operations of the five Agency Workforce Centers and their compliance with USDOL's requirements. Planmatics reviewed their financial system, cost eligibility determination procedures and maintenance of case records. The recommendations required corrective actions regarding the financial and administrative conduct of the NN WIA program. In 2004, a second

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<sup>1</sup> This information is confidential

on-site review was conducted to monitor the progress of actions taken as a result of the recommendations earlier. Planmatics also provided additional assistance to specifically address those recommendations that were not fully satisfied and required additional corrective action.

The second project was initiated in the period 2006 through 2007, when Planmatics provided services similar to those in the current solicitation to the California Human Development Corporation<sup>2</sup>. CHDC is a large nonprofit community based organization receiving federal funding, with significant assets and a very diverse spectrum of targeted services. Planmatics conducted a review of the Migrant Worker Program, provided technical assistance primarily in the areas of administration and financial management and assisted the organization to revise/rewrite some of their policies and procedures in the areas of fiscal management and cash flow in order to comply with federal requirements. In 2008 and early 2009, Planmatics conducted follow up visits to the site at the request of the Federal Representative in the Region to provide additional assistance to CHDC to help implement some of the recommendations that were not fully satisfied and required additional corrective action.

Over the past fifteen plus years Planmatics also provided services of a similar nature to other state organizations and grant recipients in a variety of DOL programs from Alaska to Puerto Rico and from New England to California. The programs include: the SCSEP 502E National Grant program, Migrant and Seasonal Farm Worker WIA 167 program, Division of Indian and Native Americans Program WIA166 program and Building Tomorrow's Workforce Today.

If Planmatics is awarded this project, it will be staffed by the same qualified and trained individuals (Charles Bertolami and Pahl Gunn) that conducted the West Virginia study in 2008. In their 80 plus years of combined experience, in addition to being local directors, they have both been state directors of programs with over \$100 million annual budgets. In that capacity they developed systems, procedures, policies, and all encompassed program guidance. A Research Associate will assist them to prepare the flow charts and assemble the final report and soft copy of the deliverables.

## **References**

- 1 Mr. Krister Engdahl, Workforce Development Specialist, USDOL Regional Office, San Francisco; Tel: (415) 625-7960
2. Mr. Edward J. Donahue, (*retired*) Chief of the Division of Policy, Review and Resolution of the USDOL Office of Financial and Administrative Management; Tel: (571) 436-8196

## **Deliverables**

Planmatics will provide the following:

1. Printed and bound copy of the complete compilation of policies, procedures and flow charts for the entire FAM Division
2. An electronic format of the above mentioned item in MICROSOFT WORD

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<sup>2</sup> **This information is confidential**

## **Period of Performance**

Between September 7, 2009 and December 1, 2009

## **Project Work Plan**

### **Week 1:**

- Conduct phone conference with WV officials to discuss their needs and expectations, our plan of action and logistics for visits:
  - Define differences between policies, practices, opinions, and procedures
  - Thoughts on local WIA needs
  - Current issues, problems, and needs
  - Obtain a copy of all current WV administrative and fiscal policies and procedures and flow charts
- Create a list of all required policies and procedures (p&p) of each unit of FAM with a supplement of additional recommended p&p.

### **Week 2:**

- Review material sent by WV officials.
- Draft preliminary new p&p (recommended).

### **Week 3:**

- Conduct on site meetings with fiscal and administrative staff responsible for overseeing, implementing, and monitoring WIA related p&p first as a group and subsequently with individual staff members of each unit identified as the responsible parties for each item.
- Conduct group meeting with selected local WIA directors and staff to discuss their perceived needs etc. regarding p&p for the functions of the units of FAM.

### **Week 4:**

- Synthesize site visit material and prepare preliminary draft p&p and flow charts.
- Conduct a follow up meeting with WV fiscal and administrative principals to present draft p&p and flow charts, review material and obtain feedback.
- Incorporate feedback of WV personnel and prepare final draft report

### **Week 5:**

- Assemble the final draft with index and cross-references and flow charts.
- Prepare electronic copy and submit the deliverables.



## VENDOR COST SHEET (RFQ WWV-10-860)

### Work Plan

Task 1	Initiate project workplan	
Task 2	Review, revise and develop p&p & flow charts	Wk 1-2
Task 3	Prepare final report and assemble flow charts	Wk 3-4 Wk 4-5

### I. Labor

<u>Category</u>	<u>Rates</u>	<u>Hours by Task</u>			<u>Total Hrs.</u>	<u>\$ Cost</u>
		<u>Task 1</u>	<u>Task 2</u>	<u>Task 3</u>		
Senior Reseracher I	\$85.31	40	80	30	150	\$12,796.50
Senior Reseracher II	\$85.31	40	80	20	140	\$11,943.40
Research Associate	\$55.75		16	24	40	\$2,230.00
<b>Total</b>		<b>80</b>	<b>176</b>	<b>74</b>	<b>330</b>	<b><u>\$26,969.90</u></b>

### II. Other Direct Costs

<u>Cost Category</u>	<u>Number</u>	<u>Average Cost</u>	<u>Personnel</u>	<u>Trips</u>	<u>Quantity</u>	<u>\$ Cost</u>
Transfers	1 transfers/tr	\$55.00	2	1	1	\$110.00
Per Diem						
Lodging	8 days/trip	\$105.00	2	1	8	\$1,680.00
Lodging Tax @ 15%	8 days/trip	15%	2	1	8	\$252.00
M&IE	8 days/trip	\$50.00	2	1	8	\$800.00
Car Rental	8 days/trip	\$100.00	1	1	8	\$800.00
Gas & tolls	1 /trip	\$50.00	2	1	1	\$100.00
Printing, supplies etc.						\$100.00
<b>Total</b>						<b><u>\$4,842.00</u></b>

Total Personnel

Total ODCs

Profit and G&A on ODC's

I+II. TOTAL FUNDS

\$26,969.90

\$4,842.00

\$884.28

\$32,696.18