
A Proposal to Conduct an Education Efficiency Audit of the State of West Virginia's Primary and Secondary Education System

Submitted to:

Ms. Roberta Wagner
State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Street, East
Charleston, West Virginia 25305-0130

Submitted by:



Evergreen Solutions, LLC
2852 Remington Green Circle, Suite 101
Tallahassee, Florida 32308

RECEIVED

200 SEP 22 A 10: 10

PURCHASING DIVISION
STATE OF WV

September 23, 2010



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

NOTICE

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

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



Evergreen Solutions, LLC

2852 Remington Green Circle, Suite 101 - Tallahassee, Florida 32308
850.383.0111 - fax 850.383.1511

September 20, 2010

Ms. Roberta Wagner
State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Street, East
Charleston, West Virginia 25305-0130

Dear Ms. Wagner:

Evergreen Solutions, LLC, is pleased to submit our proposal in response to your Request for Quotation (RFQ) and Expression of Interest (EOI) to conduct an Education Efficiency Audit of the State of West Virginia's primary and secondary education system. The professionals at Evergreen Solutions include some of the nation's leading education management experts. Our team offers the State of West Virginia extensive experience in conducting education efficiency audits at both the state and local levels.

Evergreen Solutions was formed to provide an alternative to the traditional consulting firms. We provide an innovative and effective option to our clients by focusing on creating a partnership with you and not simply being another service provider. As a national firm, Evergreen Solutions continues to grow and our territory now includes 35 states. Evergreen Solutions is a female-owned business, certified as an M/WBE in 12 states, municipalities, and school districts across the nation.

I, Dr. Linda Recio, will serve as Project Director for the Education Efficiency Audit. I am very familiar with education systems in many states, having directed studies for Evergreen Solutions in Virginia, Minnesota, Massachusetts, Pennsylvania, Ohio, Oklahoma, Georgia, Florida, Texas, California, Washington, South Carolina, North Carolina, and several other states. I am the President of Evergreen Solutions, and have over 30 years of experience in public education as a classroom teacher, teacher educator, school district administrator, and consultant. As a state policy director with the Florida Education Planning Commission, I was responsible for conducting numerous studies of state-level educational structure and organization. Each of these studies included presentations to the State Legislature, and some involved Governor briefings.

As evidenced in **Section 1** of our proposal, Evergreen is well qualified to conduct an education efficiency audit for the State of West Virginia due to our experience in providing similar services to state education agencies throughout the country. As one example, Evergreen Solutions was on contract with the Program Evaluation Division of the North Carolina General Assembly, as part of the Appropriations Act of 2008, to conduct a Policy Analysis of Education and Governance in North Carolina. This analysis includes a review of the State Board of Education, the State Superintendent of Education, and the Department of Public Instruction. The study included, but was not be limited to: roles of agencies and individuals; analysis of governance structure; funding streams; cost benefits ratios; oversight and accountability; peer state education agency size and output comparison; analysis of Department of Public Instruction organization problems; analysis of Department of Public Instruction accountability and quality; and best practices of similar organizations. The study concluded with a comprehensive report and implementation plan, multiple presentations to the General Assembly as well as draft legislation. I directed this study for Evergreen Solutions.

Evergreen Solutions brings forth a very qualified and experienced group of consultants, as evidenced in Section 2 of our proposal. Many of our consultants have worked together on numerous education efficiency audits for state and local education agencies throughout the country. As part of our consultant team, we are proposing a Technical Advisory Committee consisting of a group of technical advisors who have extensive experience in specific areas pertaining to this education efficiency audit. Each technical advisor brings a unique perspective based on his/her individual experience with education reform, governance, policy creation, and implementation, and the various leadership roles each has served throughout the country.

Our consultant team, which includes our technical advisors, consists of:

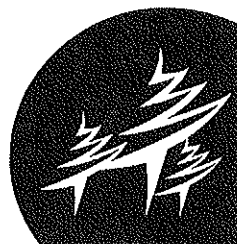
- a State Superintendent of Education who has served in three states;
- a celebrated scholar who was nationally recognized by President George Bush for his work in state finance and reforms;
- a state budget and policy director for three Governors;
- a Director of an Education Policy Center;
- a former Commissioner of Education for a State Education Agency; and
- two former school superintendents;
- an Executive Director of a State Board of Education;
- a senior policy advisor who has consulted Governors in many states.

All of our consultants have considerable experience in each of the areas required in the RFQ/EOI:

- delivering performance or efficiency reviews to state government entities;
- identifying and achieving government efficiencies; analyzing state budgets;
- developing and analyzing public policy; advising Governors and state agency heads on high level policy matters;
- knowledge working with state governments; developing and implementing legislative recommendations and reports;
- researching and comparing policies and programs across different states; developing guidelines for conducting school system efficiency audits/reviews; and
- developing, coordinating, and implementing communications plans for government agencies in general and elected officials.

WHAT SEPARATES US FROM OTHER PROPOSALS SUBMITTING QUOTES?

The consultant field for conducting education efficiency reviews/audits at both the state and local levels has grown and is clearly more competitive than in the past. Therefore, we thought it might be helpful to identify what we feel sets us apart from other consulting firms.



- **First**, we have conducted preliminary research on the State of West Virginia's Education System and we have summarized this information in our proposal in **Section 3**.
- **Second**, with the downturn in the economy, we have reduced our client fees. Yet, we have not reduced the quality services we have always provided to our clients.
- **Third**, our detailed methodology identified in **Section 3** is unsurpassed. These tools include project protocols, self-assessment instruments, interview guides/questionnaires, and focus group guidelines. We are most proud of our best practices manual which is state-of-the-art. This manual was recently updated due to our work in 10 school districts in the State of Washington.
- **Fourth**, our dedicated team is comprised of senior consultants, who each not only meet but exceed RFQ/EOI requirements and who have conducted numerous education efficiency audits at both the state and local level. Most of our consultants were educators and school district administrators before becoming consultants. Because of this, our education clients have been comfortable with addressing issues and concerns with us in a collegial manner.
- **Fifth**, we have the ability to conduct an effective large scale study in a short time frame. For example, we completed an initial education audit of the Los Angeles Unified School District (second largest in the nation) in just two months.
- **Sixth**, our client's references will attest to our ability to provide quality reports with practical recommendations that can be implemented.
- **Seventh**, we will provide technical assistance for implementation at no cost to the State.

In summary, as a result of the numerous education efficiency audits our consultant team has conducted throughout the country, as well as our staff's expertise and experience as it relates to state governments and K-12 education, we feel we are the best qualified to provide the services being requested by the State of West Virginia. We can accomplish this because we have hands-on experience, technical expertise, and an understanding of the efforts needed to effectively complete the requested education efficiency audit in a timely manner.

We are committed to working with you to achieve your goals and pledge our best efforts if selected for this engagement. If you have any questions, or need further information, please contact me at (850) 383-0111 or via email at linda@consultevergreen.com.

Thank you for your consideration.

Sincerely,



Dr. Linda A. Recio
President
Evergreen Solutions, LLC



Price Quote

Evergreen Solutions, LLC is pleased to present our proposed price quote to conduct an Education Efficiency Audit of the State of West Virginia's primary and secondary education system. Evergreen Solutions is committed to providing the highest quality consulting services to our client partners for a reasonable price. Evergreen Solutions is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

Our total, not-to-exceed, fixed-cost to complete the audit is **\$189,500**. Our cost is all inclusive, and includes travel costs, fringe benefits, indirect cost (overhead), and all other out-of-pocket expenses. We have included the required Request For Quotation Forms.

We are willing to negotiate the time, scope, and cost of the basic tasks, or any other options that the State of West Virginia wishes to identify. Evergreen Solutions federal employer identification number is 20-1833438.





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
 GOV20110

PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF
 BUYER 41
 304-558-0492

RFQ COPY
 TYPE NAME/ADDRESS HERE

OFFICE OF THE GOVERNOR
 1900 KANAWHA BOULEVARD, EAST
 CHARLESTON, WV
 25305-0370 304-558-2000

VENDOR

SHIP TO

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B	FREIGHT TERMS
08/25/2010				

BID OPENING DATE: 09/23/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	JB		946-30		
				EXPRESSION OF INTEREST - <i>(letter submitted 9/7/10 w/questions)</i>		
				EXPRESSION OF INTEREST THE WEST VIRGINIA PURCHASING DIVISION, FOR THE AGENCY, THE GOVERNOR'S OFFICE, IS SOLICITING EXPRESSIONS OF INTEREST FOR AN EDUCATION EFFICIENCY AUDIT OF WEST VIRGINIA'S PRIMARY AND SECONDARY EDUCATION SYSTEM PER THE FOLLOWING BID REQUIREMENTS AND ATTACHED 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 SERVICE SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN. 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.		
						<i>(see next page) for quote</i>

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE *[Signature]* TELEPHONE (850) 383-0111 DATE 9.20.10

TITLE President FEIN 20-1833438 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
GOV20110

PAGE
2

ADDRESS CORRESPONDENCE TO ATTENTION OF
BUYER 41 304-558-0492

VENDOR

RFQ COPY
 TYPE NAME/ADDRESS HERE

SHIP TO

OFFICE OF THE GOVERNOR
 1900 KANAWHA BOULEVARD, EAST
 CHARLESTON, WV
 25305-0370 304-558-2000

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
08/25/2010				

BID OPENING DATE: 09/23/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
***** THIS IS THE END OF RFQ GOV20110 ***** TOTAL:						\$189,500

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>[Signature]</i>	TELEPHONE (850) 383-0111	DATE 9/20/10
TITLE President	FEIN 20-1833438	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
GOV20110

PAGE
3

ADDRESS CORRESPONDENCE TO AGENT NUMBER
BUYER 41
304-558-0492

RFQ COPY

TYPE NAME/ADDRESS HERE

OFFICE OF THE GOVERNOR

OFFICE OF THE GOVERNOR

1900 KANAWHA BOULEVARD, EAST
CHARLESTON, WV
25305-0370 304-558-2000

DATE PRINTED	TERMS OF SALE	SHIP VIA	FCR	FREIGHT TERMS
09/09/2010				
BID OPENING DATE: 09/23/2010				

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	BID OPENING TIME	UNIT PRICE	AMOUNT
0001	1	JOB		946-30	01:30PM		
		EDUCATION AUDITING					
***** THIS IS THE END OF RFQ GOV20110 ***** TOTAL:							\$ 189,500

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE: *[Signature]* TITLE: President

PHONE: (850) 383-0111 DATE: 9-13-10

FBN: 20-1833438

ADDRESS CHANGES TO BE NOTED ABOVE

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