



EXPRESSION OF INTEREST

**Education Efficiency
Audit**

**West Virginia's Primary and
Secondary Education System**

RFQ NUMBER: GOV20110

ORIGINAL

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PROCUREMENT DIVISION
STATE OF WV

**SUBMITTED BY:
PUBLIC WORKS LLC
SEPTEMBER 23, 2010**





September 23, 2010

Roberta Wagner
Purchasing Division
2019 Washington Street, East
Charleston, WV 25305-0130

Dear Ms. Wagner,

Public Works, partnering with MGT of America, Inc., is pleased to present the attached response to the Expression of Interest published by the State of West Virginia for an Education Efficiency Audit of the West Virginia Primary and Secondary Education System, RFQ Number: GOV20110.

Our team consists of experienced professionals who have all served in government, including education, at various high-level positions throughout the country. We bring to the State of West Virginia this wealth of knowledge and expertise to fulfill the requirements of the EOI. We have conducted many reviews of entire governments, as well as educational systems, single departments and functional areas of operation that have saved clients millions of tax payer dollars. We look beyond strictly organizational "boxes" and find ways for government to work more efficiently, capture additional non-tax revenue and meet growing demands for services without subsequent increases in staffing and spending. In fact, we have conducted such reviews in West Virginia, identifying millions of dollars in savings to the state government.

We believe that an efficiency audit requires, not only an analysis of organizational structure and identification of efficiencies, but also an understanding of the legislative, regulatory and historical context of programs and operations. Crafting recommendations requires an understanding of best practices and benchmarking, as well as understanding the political atmosphere of a particular jurisdiction. Public Works and MGT bring this range of understanding to such an engagement as envisioned by the Governor's Office in West Virginia.

We look forward to working with you to achieve your goals and objectives for this project. If there are any questions, please do not hesitate to contact me at 610.296.9443 or eschnurer@public-works.org.

Thank you in advance for your consideration.

Sincerely,

Eric B. Schnurer
President

TABLE OF CONTENTS

Introduction	1
Overview of Public Works	2
Overview of MGT of America, Inc.	4
1. Vendor Experience	6
1.1. Number of Efficiency and Productivity Audits	6
1.2. Experience Providing Public Policy Research to Elected Officials	12
1.3. Experience with Government Program Reviews	18
1.4. Experience with Government Budget Analysis	22
1.5. Experience with Implementation of Cost Saving Programs	25
1.6. Experience with Advising Statewide Elected Officials	26
1.7. References	30
A. Public Works – Client References	30
B. MGT of America, Inc. – Client References	31
2. Proposed Personnel	33
Public Works Team	33
MGT Team	37
3. Project Plan	50
3.1. Approach	50
Task 1: Project Initiation and Setting of Priorities	51
Task 2: Review All Relevant Data, Reports and Background	52
Task 3: Conduct Benchmarking Research and Analysis	53
Task 4: Conduct On-Site Research and Diagnostic Assessment	53
Task 5: Prepare Preliminary Findings, Recommendations and Implementation Plans	55
Task 6: Submit Draft Report for Input	57
Task 7: Incorporate Input and Submit Final Report	58
Task 8: Advising on Policy Issues	59
3.2. Timeline	60
3.3. Project Management	64
4. Required Forms	66



INTRODUCTION

Public Works, one of the leading firms today conducting government performance and efficiency reviews around the country, is pleased to partner in this engagement with **MGT of America, Inc. (MGT)**, another leading management and consulting firm with national experience in conducting reviews to improve government operations.

The combination of experience from both **Public Works** and **MGT** offers the State of West Virginia the most comprehensive and experienced team to meet the goals and objectives outlined in EO: GOV20110.

Not only does this team understand the operating and performance of educational systems, it brings to West Virginia unparalleled knowledge of how government works in general and West Virginia in particular. **Public Works** has conducted efficiency reviews around the country and a statewide Performance Review in West Virginia, identifying over \$300 million in efficiencies. We also worked with the Governor's Office to oversee initial implementation of the recommendations, as well as continued to advise the Governor on a wide range of policy initiatives, including specifically upgrading and modernizing West Virginia's education system from early childhood through workforce training.

MGT has conducted over 250 efficiency reviews of government agencies and school entities around the country, including educational systems reviews in 29 states. Its team members possess a thorough understanding of educational structures and operations, having served in various instructional and administrative roles at all levels of the educational system. These two firms have collaborated together successfully before in performance reviews in New Mexico, California, and, of course, West Virginia – where **MGT** similarly served as a subcontractor to **Public Works** on the West Virginia Performance Review.

For ease of reference, we have organized this proposal according to the evaluation criteria identified in the Expression of Interest. We provide an overview of **Public Works** and **MGT** below; the remainder of the proposal includes:

1. **Vendor Experience:** This section describes a sample of efficiency review projects conducted by both **Public Works** and **MGT**, highlighting the areas of: Efficiency/Productivity Reviews, Providing Public Policy Research to Elected Officials, Program Reviews, Budget Analysis, Implementation of Cost Saving Programs, and Advising Statewide Elected Officials. The section also includes references for both firms.
2. **Proposed Personnel:** The section includes information on key team members proposed to carry out the requirements of this engagement – a team of professionals with experience in West Virginia government, public policy and operations, and education.



- 3. Project Plan:** This section outlines the approach and timeline for this engagement. Our approach is one that has been successfully used in numerous states to conduct efficiency reviews, including the previous review in West Virginia where we identified over \$300 million in efficiencies. We present an approach and timeline to meet the requirements identified in the Q&As, that is, "audit to be completed by December 31, 2010,.....results of the audited are submitted to the West Virginia Office of the Governor no later than January 31, 2011."

Overview of Public Works

Public Works provides public policy research and analysis, organizational development, and management consulting to government agencies, think tanks, and non-profits across the country.

Our mission is to help governments and policymakers develop groundbreaking policy initiatives and programs while achieving their objectives efficiently and cost-effectively. At Public Works, we focus on ways to help the public sector spend less and do more - producing, measuring, and improving desired outcomes. Our program ideas have been called "novel" and "ground-breaking." And we are helping governments across the country turn these ideas into realities.

Public Works believes wholeheartedly in the value of the public sector. That is why our senior personnel have spent their careers in public service, and this philosophy drives our activities in private consulting. We remain dedicated to ensuring that the public sector works as well as possible.

Our senior-level personnel have all served extensive tours of duty in state government in policy-making positions. They include former state cabinet officials, gubernatorial and U.S. Senate chiefs-of-staff, and state agency directors, and agency policy directors. We include experts on health care, aging, public health, children's and family services, criminal justice, environmental policy, and economic development -- precisely the people you would choose to make things happen at the highest level of your agency if you were drawing them from within government.

And as a firm, we have worked with both state agencies and governor's offices around the country. We embody the small size, low-key image, and sensitivity crucial to successful development of innovative solutions to challenging policy problems. Our practical and realistic solutions go beyond good ideas and include the development of feasible implementation plans for programs, policies, and operations.

While this core of leadership and research is present for all projects, Public Works brings to bear the expertise of a wide range of other former state and local government officials at the Cabinet and sub-Cabinet level to address the specific policy and management needs of our clients. This allows us to provide the highest caliber of task-specific expertise that any client needs on any particular project, without the cost of maintaining such a large and expensive staff full-time in large and expensive offices.



Our consulting network encompasses nearly 100 professionals with extensive experience in federal, state and local government operations in such areas as administration, budgeting, program planning, operation, evaluation, quality assurance, risk analysis, and mainframe computer applications. Their collective subject matter experience extends from corrections, public safety, education, housing, logistics, insurance, social services and mental health to information system management and maintenance.

This combination of senior political executives and expert consultants provides the best combination of task-specific experience and political sensitivity to deliver the real-world results that top government decision-makers demand and deserve.

Public Works also possesses extensive experience with state education systems and their improvement. For instance, we:

- Conducted a complete review of the New Mexico Public Education Department.
- Conducted a post-Katrina performance review of the Louisiana Recovery School District in New Orleans, one of most challenged school districts in America.
- Worked with the California State Department of Education to study the overall operations and modernization of the state's vocational education system; designed a new way for California State University (CSU) to better relate higher education to the needs and demands of the New Economy and a series of new programs to better connect CSU to elementary and high schools to improve Science, Technology, Engineering and Mathematics (STEM) teaching throughout California schools, and studied the need for a new applied doctorate in education to meet the needs of California's school system.
- Conducted a comprehensive assessment of the alignment of Arizona's education and workforce systems, and worked with the Arizona P-20 Council to assess ways to better bring all education and workforce programs together.
- Undertook an extensive review and financial analysis of the California Student Aid Commission.
- Oversaw coordination of the public education, higher education, and workforce agencies in New Mexico.
- Assessed early childhood programs in Washington.
- Developed school safety programs in California and Mississippi.

Just as importantly, we have extensive experience in West Virginia, not only of the education system but also of overall government policy and operations. All of these projects are described in Section 1.



Additional information about Public Works can be found on our web site at: www.public-works.org

Overview of MGT of America, Inc.

MGT of America, Inc. (MGT) was organized and incorporated in 1974 under the laws of the state of Florida, and has operated under that name continuously. **MGT** currently employs more than 120 professional staff in six corporate offices in Tallahassee, Florida; Olympia, Washington; Bay City, Michigan; Austin, Texas; Sacramento, California; and Washington, D.C. **MGT** is structured as a regular corporation (type C), yet functions as a partnership. Partners are designated as Senior Partner, Partner, or Principal.

MGT brings over 36 years of educational consulting experience to state departments of education, regional education service centers, school districts, and schools. Over the years they have developed an extensive database of best practices and industry standards used to recognize exemplary practices and to recommend improvements in operational practices and procedures.

MGT has successfully managed more than 4,400 client engagements in every state and several foreign countries. Their organizational mission is supported by their capacity to deliver an extensive range of services to a variety of public sector institutions, nonprofit organizations, private businesses, and organizations and institutions. Their consultant services are supported by a full complement of support staff, office space, and technological equipment to meet client needs.

As a result of its extensive hands-on experience, **MGT** possesses a keen understanding of public school district management and operational issues. Their clients appreciate and benefit from high-quality analysis, findings, and recommendations that are practical and achievable, and completed using experienced and seasoned staff. Their PK-12 and Program Evaluation practice area services are designed to assist state, regional, and local education agencies, and include:

- Efficiency and Performance Audits and Reviews
- Facilities Planning and Analyses
- Administrative and Instructional Technology Assessments
- Human Resources and Staffing Studies
- Program Evaluations
- Curriculum and Instruction Studies
- Special Education Studies
- Alternative Education Studies
- Independent Evaluator Services
- School Improvement/School Turnaround Services
- Strategic Planning Services

MGT has conducted over 250 similar projects for state departments of education, regional education centers, and school districts, with approximately 70 in the last five



years alone. In addition, **MGT** has assisted the states of Texas, Virginia, and Oklahoma in the establishment of statewide efficiency reviews. They are currently providing key information to the states of Indiana and Vermont to establish statewide K-12 efficiency programs.

Additional information about **MGT of America, Inc.** can be found on its website at www.MGTofAmerica.com.



1. VENDOR EXPERIENCE

The following information describes both Public Works' and MGT's experience and qualifications in the areas required in the EOI. In fact, not only have we conducted performance reviews in numerous states and for numerous departments and agencies throughout the country, we have an excellent understanding of West Virginia government through our previous work in conducting a Performance Review (2005) and advising the Governor's Office from August 2005 through January 2009 on implementation and other policy issues. The two firms together have an extensive combined record of conducting efficiency and productivity reviews for every aspect of state and local government, including education and school efficiency reviews.

1.1. Number of Efficiency and Productivity Audits

Experience Categories					
Efficiency/Productivity Audits	Public Policy Research	Program Review	Budget Analysis	Implementation	Advising Statewide Elected Officials
✓	✓	✓	✓	✓	✓

Public Works and MGT have conducted statewide, functional, cross-departmental, single agency, and programmatic Performance Reviews that have touched on every aspect of government operations. **In fact, it is sometimes difficult to separate specific categories of expertise highlighted for a particular project because all of our engagements require some aspect of public policy research, budget analysis, program review, implementation and advising elected officials.** For the project descriptions that follow, we attempt to highlight the specific activities in the project that are requested in the EOI.

Following are examples of our Performance Reviews – specifically related to education, as well as across government operations.

New Orleans Recovery School District (RSD) Performance Review

Public Works conducted a thirty-day preliminary review of nine Recovery School District (RSD) functional areas to identify opportunities for efficiencies with emphasis on those Central Office areas that are currently performed by both RSD and the Orleans Parish School Board (OPSB). The nine operational areas included: Procurement, Transportation, Safety and Security, Food Services, Facilities, Information Technology, Human Resources, Academics (Curriculum and Instruction) and Athletics. Public



Works made 53 recommendations across the nine operational areas for aggregate savings in the range of \$2 million to over \$10 million and aggregate revenue improvements in the range of \$200,000 to \$1.8 million.

New Mexico Public Education Department Organizational Review

The New Mexico Department of Public Education hired Public Works to conduct an organizational review. The purpose of the review was to identify opportunities for improvement and to provide recommendations for the Department on ways it can improve customer services, and thereby respond to stakeholder needs more effectively. The review identified how well stakeholder needs were being met and how assessment and accountability tools and services were being delivered. This project included surveys of hundreds of New Mexico teachers and school administrators on the workings of various state government education-related functions.

California Student Aid Commission

The California Student Aid Commission (CSAC) was directed by the California legislature to conduct a performance review of CSAC's auxiliary institution, EDFUND, the second largest student loan guarantee agency in the United States. Working under severe time constraints and difficult cooperation issues between CSAC and EDFUND, Public Works completed a performance review that recommended tightening EDFUND's budgeting and performance compensation practices, as well as closer oversight by the Commission of EDFUND operations. This effort ultimately resulted in the Commission's decision to restructure the EDFUND board of directors and implement many of the recommended fiscal reforms.

School Construction: Reforming the California School Construction Process

For years, the school construction approval process in California was needlessly complex, with numerous steps involving as many as 40 state agencies. Further, because so many entities controlled their own piece of the overall process, no agency had ever taken responsibility for ascertaining and enumerating in one place the entire process, let alone making it easy for school districts and parents to understand and navigate. The State and Consumer Services Agency – a 12-department Cabinet agency that oversees two of the largest state entities involved in public school construction projects – engaged Public Works to sort out the morass of rules and requirements and to make them intelligible and accessible for school officials, concerned parents, and citizens. By working with various entities involved in the public school construction process, Public Works developed a step-by-step school construction primer that became the centerpiece of a state school construction-focused website. Public Works also offered recommendations on how to reform and improve this complicated process.



West Virginia Performance Review

Public Works completed a two-phase West Virginia Performance Review, having reviewed agencies and functions in seven areas: Transportation, Health and Human Resources, Motor Vehicles, Purchasing, Corrections, Alcohol and Beverage Commission, and special cross-cutting issues. Over 100 recommendations for reorganization, cost-savings, new revenues and improved customer service were accepted by the governor. Some of the recommended changes were incorporated in the state's operating budget immediately following the completion of the review. Others were implemented by the departments, with some follow-up from Public Works after completion of the final phase of the review.

The Performance Review team identified over \$300 million in efficiencies, new non-tax revenue and other savings in the West Virginia Performance Review. The Governor moved to implement the recommendations by having his cabinet members sign contracts agreeing to implement the recommendations. The initial phase of the West Virginia Performance Review was sped up to coincide with the 2006-07 budget cycle so that savings could be realized as soon as possible. Public Works successfully managed the team of analysts and the project so that the final issue papers were completed in time for the state to begin realizing savings almost immediately.

Iowa Efficiency Review

Public Works recently completed a six-month efficiency review across all major departments in Iowa state government and we are currently working with the Department of Management (DOM) on the implementation of 40 recommendations, totaling over \$128 million in savings/new non-tax revenue, that are being implemented by Executive Order of the Governor. We are also working closely with DOM and the Governor's Office as many of the 45 recommendations, totaling an additional \$207 million in savings/new non-tax revenue needing legislative action, are being considered in the legislative budget session.

As in all of our efficiency reviews, we looked at individual departments or operations – including public safety, transportation, real estate/land management, health and human services, debt collection, and corrections. We also reviewed key cross-cutting functional areas – such as Information Technology, fleet management, purchasing, warehousing, and human resources.

The final report released by the Governor on December 8, 2009 received tremendous positive press for the Governor, and most importantly, identified almost \$341 million in savings/new non-tax revenue to help fill the revenue gap in the state budget. If these recommendations are implemented, the Governor will not have to issue another across-the-board cut for 2011 to balance the state budget. The recommendations allow for a strategic, sensible way to reduce costs or bring in additional funds to avoid the inevitable havoc that across-the-board cuts can have on services to the public.



Colorado Statewide Performance Review

Public Works conducted a statewide Performance Review in Colorado – involving 23 departments. The review followed the basic steps outlined in our model, producing nearly 100 recommendations and generating \$205 million in savings or new non-tax revenues. The Colorado review required close attention to state law (TABOR) that imposed unique restrictions on state spending and involved rigorous financial vetting through both the department affected and the Governor's Budget Office. Recommendations included many common-sense changes that yielded small savings which, added together, equal significant savings to the State. Others involved reviews of federal draw-downs such as for Medicaid and fee structures that highlighted the opportunity for the State to increase revenue. Still others were major savings to the State such as revamping the procurement system (\$12.4m), increasing energy efficiency in State buildings (\$19.7m) and increasing Department of Revenue audits (\$36.9m).

New Mexico Performance Review

Public Works conducted a six-month performance review of the New Mexico state government, involving interactions with nearly every agency in the State. Through a carefully coordinated team of state employees and our consultants, Phase I of the review generated 92 specific suggestions for saving taxpayers \$379 million over a five-year period – \$74 million of that during the first budget period alone – by increasing the efficiency and effectiveness of state government. The second phase generated additional recommendations that brought total projected annual savings to approximately \$100 million – about 5% of the non-education general fund. Public Works team members were responsible for all aspects of the work, including design of the work plan, training, coaching, best practices research, assisting with fiscal analysis, interviews and write-ups of findings and recommendations.

Arkansas Department of Health

The Arkansas legislature retained Public Works to conduct a performance review of the Arkansas Department of Health (ADH), after the ADH Director announced that a decline in revenue forced him to cut \$5.3 million from the agency's budget, lay off 38 employees and eliminate 69 vacant positions. Public Works developed a new organizational structure that condensed the department's seven existing divisions into three to make clear the lines of accountability and to streamline decision-making. Public Works developed an in-depth implementation plan based upon our review of ADH operations and an identification of national best practices. The work resulted in bi-partisan political support and agency ownership of the report.

Commonwealth of Virginia Department of Planning and Budget

MGT conducted efficiency reviews of 24 school divisions with enrollments ranging 783 to over 70,000 students: Alexandria City, Bath County, Campbell County, Charlottesville



City, Chesterfield City, Clarke County, Culpeper County, Dinwiddie County, Franklin County, Hampton City, Isle of Wight County, Lancaster County, Loudoun County, Louisa County, Montgomery County, Norfolk City, Petersburg City, Prince William County, Rappahannock County, Roanoke City, Smyth County, Williamsburg-James City County, Winchester City, and York County. Each review examined district organization and administration, human resources, financial management, food services, purchasing, transportation, technology, education service delivery, special education, and facilities use and management. Over 90 percent of **MGT's** recommendations have been implemented by the school divisions, with average savings exceeding \$1 million annually in each division.

Texas Legislative Budget Board

MGT has conducted management and performance reviews of 21 Texas independent school districts. The studies included a review of the district's organization and management areas of educational service delivery, district leadership, community involvement, human resources management, facilities construction use and management, asset and risk management, financial management, purchasing and warehousing, food services, transportation, computers and technology, and safety and security. **MGT** identified how the district defines performance through goals and objectives (both the educational component as well as overall district operations); measures performance (specific, quantifiable, and achievable); focuses on measuring outcomes; and evaluates how well it is performing compared to the goals and objectives it has developed (or must comply with due to broader Texas Education Agency requirements).

Texas Legislative Budget Board Human Resources Efficiency Reviews of Five Independent School Districts and Statewide Report

MGT was engaged by the Texas Legislative Budget Board to review human resources and substitute teacher programs in five Texas independent school districts (Brooks, Hooks, Humble, Kerrville, and Tahoka). **MGT** reviewed HR organization and management, staff development, benefits administration, recruitment, hiring, and retention, performance management, and contracting processes; and policies, procedures, and activities related to the recruitment, training, placement, and retention of substitute teachers. **MGT** also prepared a statewide report with findings, research, and recommendations based on best practices in other states for the state of Texas to consider.

Washington State Auditor's office Performance Audit of Nine Regional Educational Service Districts

MGT conducted performance audits of Washington's nine Educational Service District (ESDs). The audit process addressed the performance audit objective identified in



Washington statutes, with an initial Survey Audit (diagnostic), followed by a complete performance audit. MGT identified operational areas where efficiencies could be accomplished and/or effectiveness improved. The MGT Audit Team utilized Generally Accepted Government Auditing Standards (Yellow Book) and utilized TeamMate software to write the audit and store all audit documentation.

**Texas Legislative Budget Board
Management and Performance Reviews of 20 Regional Education Service Centers**

MGT conducted a management and performance review of 20 Regional Education Service Centers (RESCs). MGT conducted detailed reviews of RESCs' governance and management, financial condition and funding adequacy, number and geographic distribution, institutional structure, program and academic delivery, human resources management, facilities use and management, asset and risk management, purchasing and contract management, and management information services.

**New Mexico State Department of Education
Evaluation of Nine Regional Educational Cooperatives**

MGT conducted an evaluation of the effectiveness and efficiency of nine New Mexico Regional Education Cooperatives (RECs) for special education programs and services. The nine RECs serve as administrators of federal special education flow-through funds and provide technical assistance to member districts on special education issues. The project included quantitative and qualitative research, data analysis of REC records, surveys from REC administrators and school officials, focus groups, and individual interviews. In collaboration with the RECs, superintendents, parents, the Special Education Office of the State Department of Education, and national experts, MGT developed a comprehensive strategic plan outlining the evolution to a regional service center system that serves all New Mexico public school districts and state-supported educational programs.

**Mississippi Department of Education
State Department Management and Efficiency Review**

MGT conducted an efficiency study and management review of the entire state Department of Education. The areas reviewed included organizational management, governance, human resources, finance, administrative services, curriculum and instruction, and technology. Surveys were sent to district superintendents and principals to assess DOE operations.



**West Virginia Department of Education
Office of School Transportation and Facilities**

MGT conducted an efficiency study of the school transportation system for the Department of Education to examine the existing transportation practices in the state and the reporting on those practices. MGT reviewed the following issues: adequacy, effectiveness, and efficiencies of funding; job classes, appropriate staffing, and work schedules; bus routes; fleet maintenance; and safety training. MGT also reviewed inter-county busing services, regionalization of operations and maintenance, and alternative transportation systems to enhance cost-effectiveness. MGT provided recommendations and suggestions for implementation.

1.2. Experience Providing Public Policy Research to Elected Officials

Experience Categories					
Efficiency/Productivity Audits	Public Policy Research	Program Review	Budget Analysis	Implementation	Advising Statewide Elected Officials
✓	✓	✓	✓	✓	✓

Public Works has conducted a wide range of specific policy development and implementation projects for state governments across the country. In many of Public Works' policy development projects, we have been asked to lay out detailed recommendations for how to improve the actual functioning of agencies and implementation of programs which involved our working closely with top state officials to make those recommendations work.

Public Works is a pioneer in high-level public policy and strategic planning for government CEOs in a consulting capacity. Not only are we hired for specific engagements to solve particular problems, we also function as an on-going policy office and strategic planners – for governors, agency heads, and other chief executives.

We have overseen long-term planning retreats and developed long-term agendas with a detailed schedule for the development, roll-out, communication, and implementation of major policy initiatives in health care, education, government reform, taxation, economic development, worker safety, and children's and family services;

We helped to develop and implement performance measures to make sure agencies were implementing the Governor's agenda; helped tackle and solve inter-agency problems without an organizational home, from workforce development to "social transportation" programs for the aged and disabled; ensured interagency coordination and gubernatorial control; and worked throughout the year to develop the long-term and detailed programs that became the Administration's lead initiatives for the following year.



The following are examples of some of the policy development projects Public Works has undertaken.

West Virginia Governor's Policy Office

Public Works assisted the state of West Virginia in a policy capacity from the start of Governor Joe Manchin's term until 2009. In this capacity we developed policy and coordinated implementation of plans with cabinet members in energy, environment, health, human services, insurance, education, and regulatory affairs.

Public Works helped implement an ambitious agenda that the Governor laid out in his "West Virginia: Open for Business" plan, which we helped to develop for him. Governor Manchin spoke passionately about this plan during his 2005 State of the State address:

Two years later, Governor Manchin's 2007 State of the State Speech not only was replete with policy initiatives that **Public Works** helped the State develop in our on-going policy consulting role — but the speech also directly acknowledged our contributions to the State's bottom line. Governor Manchin also unveiled a number of policy initiatives that **Public Works** had a hand in developing, including:

- Establishing a campaign to emphasize the value of education and the importance of pursuing a college degree.
- Improving school safety by supporting the web-based collection of resources that can identify critical information during an emergency, such as school floor plans, locations of hazards, and means of access for emergency responders.
- Establishing a public-private partnership called Student Educational and Economic Development Success (SEEDS) to transform struggling schools through well-established business practices, such as goal-setting, time management, and performance measurement.

Public Works was asked specifically by the Governor's Office to review the structure and policy governing the West Virginia education system and make recommendations to improve the system in the state. We worked closely with the Governor's Office and the Department of Education to review state education policy, compare it to states identified as high-performing, and made recommendations that West Virginia could undertake in both the short- and long-term. We looked at such issues as teacher compensation, teacher incentives, technology, charter schools, testing, professional development, school discipline and responsibility, and reinventing high schools. In addition, we made recommendations concerning the structure of the State Board of Education and possible priority funding initiatives for the Governor to propose.



West Virginia 21st Century Jobs Cabinet

Public Works assisted Governor Manchin in establishing a 31-member 21st Century Jobs Cabinet of West Virginia, co-chaired by First Lady Gayle Manchin and the CEO of a multinational company. We provided advice to the administration about the Cabinet's makeup, structure, and policy priorities and were directly involved in the Cabinet's on-the-ground planning and implementation of major activities, including development of the legislative agenda; creation of a public-private enterprise, SEEDS (Student Educational and Economic Development Success), to mentor public school teachers; and inception of the state's new Internet portal to expand on-line education and training statewide.

Arizona Department of Environmental Quality

Public Works provided the Department with policy development, long- and short-term planning and management, and research and analysis support for the Department's newly created Office of Children's Environmental Health. The main goals were to develop a streamlined management structure for the Office and provide the Department with policy recommendations to improve existing programs governing the protection of children's environmental health. Public Works helped to develop specific policies that the office could pursue, as well as possible legislative proposals.

California Department of Social Services

The Department retained Public Works to research welfare sanction policies and recommend whether a stricter policy was needed to encourage compliance and participation. There had been disagreement amongst the legislature, the Department, and the Governor's Office as to how to treat non-compliant TANF participants; Public Works' recommendations threaded a difficult policy *and* political needle between these competing positions. Public Works determined that for certain welfare recipients, tougher sanctions, coupled with adequate services, could have a positive effect on recipient behavior and program compliance. We also determined that tougher sanctions were *not* called for as to others – and we found that, in general, the sanctions were pointless unless the state funded efforts to help address the reasons underlying non-willful noncompliance. The proper application of sanctions could reduce state cash payments between \$17 million to \$40 million annually, enabling the state to shift resources spent on noncompliant recipients to increased investment in programs that some recipients needed to boost their compliance.

New Mexico Department of Economic Development – Streamlining Corporate Tax Cuts to Encourage Job Growth

Virtually every state and local government offers tax credits to businesses in an effort to lure and retain jobs and increase tax revenues. The New Mexico Department of Economic Development retained Public Works to analyze its portfolio of corporate tax credits and to propose policies that would streamline these tax credits and incentives



and effectively attract high wage jobs to New Mexico. The Public Works proposals identified incentives that would benefit New Mexico workers by rewarding the creation of jobs with above-average wages and employee benefits in likely high-growth, 21st Century industries.

Louisiana “No Wrong Door” Program

The Louisiana Governor’s Office retained Public Works to assist the state’s Department of Social Services (DSS) in implementing its new “No Wrong Door” initiative, consisting of structural and operational service integration that results in coordinated, client-centered services; co-located office sites; maximizing funds from various funding streams; early intervention and prevention efforts and performance-based accountability. Public Works specifically worked with DSS on the design of its “enterprise business unit” – making the policies and practices of its various divisions work together more efficiently and, simultaneously, challenging the status quo to create a more dynamic and innovative agency. A major part of this was creation of a centralized policy team to serve as the change-agents for the department – providing an entity for both “cross-silo” thought and management *and* agency-wide *planning*, in a meaningful sense. Public Works prepared a profile of the agency’s current functioning, the impediments to realizing the new integrated model, and how they might be overcome, as the first steps in implementing the centralized planning function the Secretary envisions as well as reorganization across the department.

Iowa Policy Office

The follow-on contract to assist the state with implementation of recommendations from the Efficiency Review also calls for Public Works to work with the Governor’s office on the research and development of policy initiatives. Over the past year, we have developed policy and program ideas related to early childhood education, tax incentives to create jobs, and other job creation and economic development activities. We have also worked with departments to develop additional policy and program initiatives that have been identified through efforts to implement recommendations.

New Mexico Governor’s Office

Public Works regularly develops legislative recommendations for all of the Governor’s Offices with which we work. A long-standing relationship was with the New Mexico Governor’s Office. The administration considered 38 recommendations from Public Works for inclusion in the 2006 legislative session, with Governor Richardson touting six of those ideas in his 2006 state of the state address. Those proposals included: creating a revolving loan fund to convert dairy waste to energy; a new grant program to increase parental involvement in schools; new before-and-after school anti-obesity programs; and targeting certain substance abusers for probation and treatment rather than prison terms. And during his 2007 State of the State address, Governor Richardson



announced a number of additional policy initiatives that Public Works helped develop for him, including:

- Augmenting the state's Renewable Energy Portfolio standard to require utilities to produce 15 percent of their energy from renewable resources by 2015 and 25 percent by 2020.
- Becoming the first state in the country to require state facilities to use 100 percent renewable energy.
- Giving consumers a one-month tax holiday to purchase energy efficient appliances.
- Enhancing water conservation by river ecosystem restoration and mandating water efficiency standards in building codes.
- Raising teacher salaries but tying those increases to tougher accountability standards.
- Investing in afterschool enrichment programs to tutor and mentor students.
- Making it harder for students to drop out by raising the drop out age from 17 to 18.
- Tripling the funding for substance abuse treatment in New Mexico.

Louisiana Governor's Office

In 2005, the Louisiana Governor's Office retained Public Works to provide policy advice and recommendations on a wide-ranging series of issues, including the development of policy proposals to reduce poverty and encourage economic self-sufficiency; ensure that recipients of the state's social services could be apprised of all available services for which they were eligible, regardless of which social service agency or programmatic "door" they entered; encourage rural and inner-city economic development in ways that contribute to smarter growth and development; and enhance workforce development in areas that will support statewide economic development. Some of these policy proposals led to the issuance of executive orders and were included in the Governor's legislative agenda. We also worked extensively with the Blanco Administration to develop the federal legislation in the wake of Hurricanes Katrina and Rita, the Governor's state recovery legislation, and the Louisiana Recovery Authority's housing redevelopment plan.

California Environmental Protection Agency

The Secretary of the California Environmental Protection Agency asked Public Works to design and implement a brownfields redevelopment program. Previous efforts to enact brownfields legislation in California had floundered on an intractable debate over a technical issue. Public Works not only cut this Gordian Knot with a solution hailed in the press as "novel" and "ground-breaking" - but also directed an inter-departmental working group in crafting the program, drafting the legislation, and shepherding it through the legislature, working directly with the Secretary and the Governor's Office to create a signature initiative for the Governor.



We worked closely with agency staff for two years in the role of “chief policy deputy,” bringing personnel together across internal and external boundaries, developing concepts and turning them into specifics, keeping the process moving, helping develop legislative strategy, and seeing the effort through until the Governor signed the measure into law. And then we went out and did it again the next year: We devised a strategy to make funding available for a new cleanup program that would target the funds to a largely unfunded area – paying the premium on the private insurance needed to cover cleanup projects against the downside risk of uncovering additional, previously-undiscovered pollutants. This also produced maximum financial leverage for enabling projects to proceed for the minimal funding available from the legislature.

TANF Reform: California Department of Social Services

The Department retained Public Works to research welfare sanction policies and recommend whether a stricter policy was needed to encourage compliance and participation. There had been disagreement amongst the legislature, the Department, and the Governor's Office as to how to treat non-compliant TANF participants; Public Works' recommendations threaded a difficult policy and political needle between these competing positions. Public Works determined that for certain welfare recipients, tougher sanctions, coupled with adequate services, could have a positive effect on recipient behavior and program compliance. We also determined that tougher sanctions were not called for as to others - and we found that, in general, the sanctions were pointless unless the state funded efforts to help address the reasons underlying non-willful noncompliance. The proper application of sanctions could reduce state cash payments between \$17 million to \$40 million annually, enabling the state to shift resources spent on noncompliant recipients to increased investment in programs that some recipients needed to boost their compliance.

Southern University: State Energy Independence Plan

Southern University in Louisiana recently commissioned Public Works to develop a report for the state legislature on steps that Louisiana state government should take right now to re-focus existing state and federal resources on clean energy, energy efficiency and clean technology products, by developing a clean technology economic development program to achieve Energy Independence. Resolutions embodying Public Works' recommendations are currently moving through both houses of the Louisiana legislature,

Texas Legislative Budget Board: Human Resource/Substitute Teacher Programs

As part of MGT's reviews of school district human resources and substitute teacher programs in five Texas independent school districts, MGT prepared a statewide report with findings, research based on best practices in other states, and recommendations for consideration in establishing and/or updated statewide policy for those programs.



**Texas Legislative Budget Board:
Student Behavior Management Programs**

MGT conducted comprehensive reviews Disciplinary Alternative Education Programs (DAEP), Juvenile Justice Alternative Education Programs (JJAEP), and pre- and post-adjudication residential facilities registered with the Texas Juvenile Probation Commission (TJPC) in six school districts. **MGT** prepared a statewide report with conclusions, research, and recommendations for policy improvements relative to those programs.

Commonwealth of Virginia: School Efficiency Review Program

Based on 24 efficiency reviews of Virginia school divisions, **MGT** created a global report on best practices and common findings and recommendations (“themes”). The global report was used by the Division of Best Practices to fine-tune the school efficiency review program policies and procedures, as well as to inform legislators on policies directly affecting school divisions.

1.3. Experience with Government Program Reviews

Experience Categories					
Efficiency/Productivity Audits	Public Policy Research	Program Review	Budget Analysis	Implementation	Advising Statewide Elected Officials
✓	✓	✓	✓	✓	✓

California State University

CSU – the world’s largest institution of higher education – requested that **Public Works** research, analyze and suggest specific actions to help better prepare Californians for the economy of the 21st Century, better relate higher education in California to the needs and demands of that economy, and better define the proper role and requirements of CSU within that process. We undertook a groundbreaking process to bring together the state’s governmental, educational, and private sector leaders to reorient the state university system to provide the attributes the state workforce will need to possess in the 21st Century; this effort involved a *Virtual Forum* throughout the university system and business communities to further the grassroots and high-tech development of this strategy. We also identified public policies required by the state government to ensure that CSU best meets the state’s needs in educating undergraduates and professionals in



these areas of critical need, and formulated specific actions to be taken by the State University to accomplish these ends.

**Maryland State Department of Education (MSDE)
Evaluation of the Increased State Aid to Local School Systems through the Bridge to Excellence Act**

MGT conducted a three-year evaluation of the implementation and impacts of the Maryland Bridge to Excellence Act. The project assessed the extent to which local school systems' strategic plans to improve student achievement, coupled with over \$2 Billion in additional state funding for K-12 education, positively affected student, school, and school system performance.

**Texas Legislative Budget Board
Student Behavior Management Performance Reviews of Six Independent School Districts and Statewide Report**

MGT conducted reviews of student behavior programs in six Texas independent school districts: Fort Bend, Amarillo, Conroe, Dallas, Ingleside, and San Antonio. MGT conducted a comprehensive review of the school district's Disciplinary Alternative Education Programs (DAEP), Juvenile Justice Alternative Education Programs (JJAEP), and pre- and post-adjudication residential facilities registered with the Texas Juvenile Probation Commission (TJPC). MGT also reviewed the pre-adjudication facilities in Bexar and Montgomery Counties. MGT reviewed delivery of educational services; instructional policies and practices; staffing and organization; student outcomes; disproportionality; provision of FAPE; record-keeping; parental involvement; and cost analyses including transportation and contracted services. MGT also prepared a statewide report with findings, research, and recommendations.

**Arizona Early Childhood Development and Health Board
First Things First Regional Needs and Assets Evaluations**

In November 2006, Arizona voters passed First Things First (FTF), a statewide initiative that funds a voluntary system of early childhood development and health to improve the developmental and early learning outcomes for young children ages five and under. FTF has responsibility for planning and implementing actions which will result in an improved system of early childhood development and health statewide. The FTF Arizona Early Childhood Development and Health Board contracted with MGT to gather and synthesize relevant community data from 10 regions into regional needs and assets reports. Each of the 10 regional needs and assets reports will inform the FTF Regional Council's decision making for the continuation or modifications needed in the programs.



**South Carolina Department of Education
Evaluation of School Improvement Programs**

MGT conducted a two-year evaluation of school improvement programs that involved developing a review of selected programs, including low-performing schools, from the implementation of the South Carolina Education Accountability Act of 1998. **MGT's** role included creating a study database; reviewing student assessment data and school improvement plans; developing, disseminating, and analyzing stakeholder surveys; and conducting on-site visits to low-performing schools.

**Maryland State Department of Education
Mississippi Department of Education
The University of Oklahoma's K20 Center
Statewide External Evaluation of GEAR UP Programs**

MGT conducted six-year evaluations of the GEAR UP program for the Maryland and Mississippi Departments of Education. The studies assessed the implementation of state and local projects funded under the federal GEAR UP legislation and the impact of the state and local projects on student achievement, parent involvement, and the skills of school staff.

MGT was awarded a second contract to evaluate Maryland's GEAR UP program, designed to increase college awareness and student math achievement in selected high schools. The five-year project involves conducting web-based and paper surveys of high school students and their parents, creating a database of service activities, maintaining a database of student achievement data, and assessing and reporting on the Maryland GEAR UP program's goals and objectives.

MGT is assisting the University of Oklahoma's K20 Center in collecting and reporting data for its six-year GEAR UP grant. This grant from the Department of Education will allow the K20 Center to facilitate activities with students, parents, educators and administrators throughout state. In order to facilitate these activities and to gather the subsequent research data they will produce, **MGT** developed a web-based application to assist K20 staff and facilitators in managing activities and program participants and research data collection. This software consists of three key components: a Participant Information Management System, an Event Management System and a Survey/Evaluation Management System.

**Illinois State Board of Education
Mississippi Department of Education
Nevada Department of Education
NEW JERSEY DEPARTMENT OF EDUCATION
Statewide Reading First Program Evaluations**

MGT is conducting a multi-year evaluation of the Reading First programs, serving as the external evaluator. The purpose of the federal program is to ensure that all students



learn to read at grade level or above by the end of third grade. Under a multi-year contract, **MGT** developed a comprehensive evaluation design to address program implementation and outcomes; document the implementation of professional development and school-based reading initiative improvements; and assess the impact of program activities on improved student outcomes in literacy. Evaluation goals are addressed through formative and summative evaluation using a variety of data collection strategies. These strategies include developing program profiles, activity logs, professional development records, and implementation and impact surveys, and analyzing student data. **MGT** will collect data from comparison schools to aid in interpreting the results. States involved include:

- Illinois: 2006 - 2009
- Mississippi: 2005 - 2010
- Nevada: 2004 -2009
- New Jersey: 2005 - 2010

Minnesota Department of Education External Evaluator on Assessment Accommodations

MGT conducted an external evaluation of assessment accommodations for students with disabilities. **MGT** designed and conducted the research study to determine if there is a correlation between curriculum accommodations and statewide assessment accommodations and the impact on student assessment results.

New York State Education Department (NYSED) Longitudinal Study of Preschool Special Education

MGT conducted a seven-year longitudinal evaluation of the impacts of preschool special education for the NYSED. The project involved tracking and comparing the academic and developmental progress of more than 10,000 students with disabilities. Half of these students received special education services while in preschool; the other half did not attend preschool. For those students who attended preschool, **MGT** compared the effectiveness of the types of settings in which they received special education services (i.e., placements with nondisabled peers compared with placements in separate services).

Texas Education Agency Evaluation of the Texas Migrant Education Program

MGT is conducting an evaluation of the effectiveness of the Texas Migrant Education Program (MEP). The goal of this comprehensive evaluation is to determine the degree of effectiveness of the MEP at meeting the needs of Priority for Services (PFS) and non-PFS migrant students and to use the results to provide guidance for ongoing programmatic decisions. This project includes an expert review and formative and summative evaluations.



1.4. Experience with Government Budget Analysis

Experience Categories					
Efficiency/Productivity Audits	Public Policy Research	Program Review	Budget Analysis	Implementation	Advising Statewide Elected Officials
✓	✓	✓	✓	✓	✓

A fundamental and critical component of any efficiency review is the ability to “get the numbers right,” and getting them right means having a thorough understanding of the state budget and budget process. Public Works and MGT have rigorous standards for financial analyses that become the foundation of recommendations, we devote a substantial amount of time gathering the numbers, analyzing them and working with state staff to ensure we are making the correct assumptions. Examples of financial analysis work and analysis of state budgets include:

New Mexico Performance Review

Ninety-two (92) recommendations were identified in Phase I of the New Mexico Performance Review that saved \$74 million when implemented. Almost all the 92 recommendations from the review’s first phase were included in the FY2005 budget submission and many were implemented even before that. Phase II of the Review, while focused more heavily on service improvements, identified savings of another roughly 2 percent of the general fund.

West Virginia Performance Review

The Performance Review team identified over \$300 million in efficiencies, new non-tax revenue and other savings in the West Virginia Performance Review. The Governor moved to implement the recommendations by having his cabinet members sign contracts agreeing to implement the recommendations. The initial phase of the West Virginia Performance Review was sped up to coincide with the 2006-07 budget cycle so that savings could be realized as soon as possible. Public Works successfully managed the team of analysts and the project so that the final issue papers were completed in time for the state to begin realizing savings almost immediately.

Colorado Statewide Performance Review

Public Works conducted a statewide Performance Review in Colorado – involving 23 departments. The review followed the seven basic steps outlined in our model, producing nearly 100 recommendations and generating \$205 million in savings or new



non-tax revenues. The Colorado review required close attention to state law (TABOR) that imposed unique restrictions on state spending and involved rigorous financial vetting through both the department affected and the Governor's Budget Office. Recommendations included many common-sense changes that yield small savings that, added together equal significant savings to the State. Others involved reviews of federal draw-downs such as for Medicaid and fee structures that highlighted the opportunity for the State to increase revenue. Still others were major savings to the State such as revamping the procurement system (\$12.4m), increasing energy efficiency in State buildings (\$19.7m) and increasing Department of Revenue audits (\$36.9m).

Delaware Demographic Study

On behalf of then-State Treasurer (now Governor) Jack Markell, Public Works undertook a detailed study of demographic changes taking place in Delaware – overall population growth faster than the national average, the aging of the population, the increasing ethnic and racial diversity of the state (particularly growing percentages of African-Americans and Latinos), and the movement of the state's population in a southerly direction into previously less-populated counties. The effects of these demographic changes were projected out to 2030, including the fiscal effects on the state government operations and budget. Delaware state government does not maintain budget projections decades in advance, so Public Works used several methods to project out state spending a quarter-century including historic growth rates in the state budget, Medicaid population projections, and overall population trends. The report then projected the increase in per-capita state government spending and concluded by analyzing numerous recommendations for the state to constrain spending levels and to increase state revenues without raising taxes over the next 25 years.

Development of Iowa State Budget and Governor's Policy Agenda

In November 2006, Governor-Elect Chet Culver of Iowa hired Public Works to help his Transition Team develop his first state budget, help implement his Iowa Power Fund, and establish the Governor's Director of Renewable Power – a new office that focused on the development of alternative fuels, renewable power, and other clean technologies. In most instances, newly-elected Governors have little or no input into the first budgets they are required to submit to the Legislature, which are generally prepared by the outgoing administration and often are submitted just days after the new governor takes the oath of office. Governor Culver broke this mold by remaking the proposed state budget – rearranging spending priorities, inserting new initiatives, and identifying specific sources of revenue to ensure the budget was balanced. During the transition, Public Works helped the governor-elect's staff to develop a number of new and innovative budget and policy proposals on education, health care and energy, including Governor Culver's highest priority proposals on renewable energy and alternative fuels.



Children's Investment Strategy: City of Philadelphia

Public Works oversaw a wide-ranging strategic planning process leading to the City of Philadelphia Children's Investment Strategy. This strategic planning effort included the development of a comprehensive Children's Budget to identify and categorize spending for children by federal, state and local agencies, and to track trends in the public sector's investment in Philadelphia's children; the Children's Budget is developed in conjunction with an annual Children's Report Card measuring key indicators of childhood wellbeing. Together, these spending and outcomes measures form the foundation for the Children's Investment Strategy. Through an array of new and expanded services, combined with a strong focus on performance, accountability and targeting of services, the strategy is targeting spending to where it is needed most, providing a roadmap for attracting \$150 million in state, federal and private sector funding, and ensuring that government is maximizing the dollars it spends.

Colorado Department of Education

MGT conducted a statewide assessment of all school facilities in the state, evaluating the educational suitability of the schools using our BASYS® assessment software. MGT also consulted on developing a prioritization and ranking system for the state capital education construction grant program.

West Virginia Department of Education Secondary school Technology Implementation Study

MGT conducted a statewide study of technology and its use in secondary schools in WV. The study was designed to document and present an accurate and representative picture of SUCCESS (Student Utilization of Computers in Curriculum for enhancement of Scholastic Skills) initiative. Over 7,000 surveys were distributed to superintendents, principals, teachers, technology specialists, students, and parents, to collect information. MGT identified secondary schools where the SUCCESS initiative was implemented most effectively, and in addition, identified best practices in the use of educational technology in WV.



1.5. Experience with Implementation of Cost Saving Programs

Experience Categories					
Efficiency/Productivity Audits	Public Policy Research	Program Review	Budget Analysis	Implementation	Advising Statewide Elected Officials
✓	✓	✓	✓	✓	✓

We believe developing realistic implementation plans is one of the most significant elements in producing recommendations. We work with agency heads, managers and staff to make sure we “get it right” and fully vet findings and recommendations to ensure we have sufficient “buy-in” to carry out the plans. We see that ensuring such savings and efficiencies are actually implemented is as important as identifying the recommendations.

Iowa Statewide Efficiency Review Implementation

After completing a statewide Efficiency Review in Iowa that identified first-year savings and new non-tax revenue of \$341 million, the Iowa Governor’s Office engaged Public Works to assist with the implementation of recommendations. We continue to work with departments on implementation of recommendations, have drafted several Executive Orders to formalize the state’s direction for implementation, and continue to work with the Department of Management and legislature on recommendations that require legislative action. We designed a process for reporting and tracking progress and identification of issues as they arise for quick intervention so that activities could stay on track. We assisted in developing the first report to the Governor that indicated, in total, savings were exceeding estimated targets.

West Virginia Performance Review

Perhaps the clearest example of our ability to identify and achieve savings comes from West Virginia itself. We projected first-year savings of \$67 million from our performance review, but the state found at the end of that year that the savings actually achieved totaled \$77 million. By the end of the second year, the state reported having achieved savings of \$201.7 million – roughly 50 percent higher than what we had projected and two-thirds of the way to the projected five-year savings total of \$318 million. At that point, the state was predicting further savings of \$92 million per year.

As we reported to the state in a January 2007 update memo, of the 43 recommendations in the original report, “one item and one item only (P-1, the e-procurement partnership with Virginia) . . . will not be possible to implement – because Virginia has decided not to



partner with West Virginia on its e-procurement system. The savings from this item would have totaled only \$300,000 over five years, however – and West Virginia is instead moving ahead with its own e-procurement system that will save even more.”

1.6. Experience with Advising Statewide Elected Officials

Experience Categories					
Efficiency/Productivity Audits	Public Policy Research	Program Review	Budget Analysis	Implementation	Advising Statewide Elected Officials
✓	✓	✓	✓	✓	✓

Public Works' senior level personnel have all served extensive tours of duty in state government policy-making positions that require the ability to work with governors and high-ranking officials. Senior level staff have successfully served in high-ranking positions that have included the Pennsylvania Secretary of Aging; the New Jersey Director of Family Development; the Chief-of-Staff and Deputy Chief-of-Staff for governors in Pennsylvania and Iowa; director of the Governor's Policy Office in Indiana and Wisconsin; senior municipal officials in budget and administration for the cities of Austin and Philadelphia; deputy counsel to the Governor of Pennsylvania; staff to and appointees of the President of the United States; and speechwriter for a former Vice President, several US Senators, and governors in Arizona, Florida and Massachusetts.

All of these positions required the ability to work with high-ranking officials – in most cases, it required *being* a high-ranking official. This demonstrated ability of our staff individually translates into the daily work of Public Works as a firm – which consists almost entirely of policy development and implementation on behalf of, and *working directly with*, governors, top gubernatorial appointees, agency heads, statewide elected officials, and members of Congress from across the country.

Additional examples of our work with governors' offices and other high-ranking officials include:

Coordinating Health Care Policy in West Virginia

Governor Joe Manchin was concerned that state health agencies were not finding the time to share information about on-going work, set joint priorities, make connections between projects, and identify the gaps that needed to be addressed. The Governor and state health policy officials feared that some efforts were being duplicated or opportunities for improvement were being missed — and they knew that better coordination was critical to addressing West Virginia's health care challenges, which include some of the highest rates of chronic diseases in the nation, more than 300,000



uninsured individuals, and runaway health care costs. To help state health agencies understand the larger context in which to make important policy decisions, Governor Manchin asked Public Works to improve communication and coordination among the state's health care agencies to ensure that health care reforms remain on the fast track for implementation.

To begin this process, Public Works conducted interviews with key health care leaders to learn about initiatives and priorities within each agency, and created an inventory of ongoing initiatives so that officials could see what other agencies and stakeholder groups were working on and identify gaps and opportunities for collaboration. Public Works facilitated a collaborative process to develop a strategic framework for health care reform in West Virginia. This framework established goals and principles to guide future health policy decisions. In addition, Public Works helped health officials to work together to identify key targets for improved coordination. For example, the state currently operates multiple wellness programs out of several different agencies, but they are not necessarily working in concert. By agreeing on a common set of desired results and identifying ways to pool fragmented funding streams for these initiatives, agencies can improve the effectiveness of these programs to better prevent chronic diseases among West Virginia's residents. Heads of all state agencies involved in health issues met regularly with Public Works staff in a collaborative process that allowed for better and more regular inter-agency communication and coordination — and kept the Governor informed and on top of his entire Administration's progress on health care issues. By doing the legwork to compile information on current initiatives, suggesting strategic areas for collaboration, and facilitating the development of common goals, Public Works helped West Virginia's health officials ensure that implementation and planning go hand-in-hand, and accelerated progress towards achieving their ultimate aim: improving the health of West Virginians.

New Mexico Governor's Policy Office

Public Works was awarded a contract to act as the outsourced policy office for the Governor of New Mexico. As such, we developed both short and long-term policy initiatives across state government and were responsible for overseeing implementation of initiatives. We were charged with a wide range of policy and strategic planning responsibilities to ensure New Mexico was able to meet growing demands for services, that it was positioned for economic growth, and that services were provided efficiently and effectively.

Louisiana Governor's Office

The Louisiana Governor's Office retained Public Works to provide policy advice and recommendations on a wide-ranging series of issues, including the development of policy proposals to reduce poverty and encourage economic self-sufficiency; ensure that recipients of the state's social services could be apprised of all available services for which they were eligible, regardless of which social service agency or programmatic "door" they entered; encourage rural and inner-city economic development in ways that



contribute to smarter growth and development; and enhance workforce development in areas that will support statewide economic development. Some of these policy proposals led to the issuance of executive orders and were included in the Governor's legislative agenda.

California State Treasurer's Green Wave Investment Strategy

Public Works assisted the California State Treasurer in the development of an innovative effort to leverage the state's pension and investment funds to push towards a cleaner environment while attracting new jobs and industries into the state. Through its \$328 billion public pension and investment portfolio, California is integrally woven into the fabric of the global capital markets. Responsible management of California's sizable portfolio requires its fiduciaries to identify emerging risks, as well as potential investment opportunities, in all sectors of the portfolio.

Public Works interviewed the Treasurer and his senior staff to understand their fiduciary responsibilities and determine their investment goals and participated in a series of focus groups and interviews with public and private sector investment experts, environmental entrepreneurs, business leaders, and environmental advocates. Public Works then made a series of recommendations on how the Treasurer could leverage the state's pension and investment funds to achieve a "double bottom line" of creating positive financial returns while spurring economic development and environmental responsibility. The result was the State Treasurer's "Green Wave" investment initiative that contained four central investment strategies to accomplish objectives.

Arkansas Department of Health (ADH)

ADH illustrates Public Works' ability to work with high-ranking officials across divides of hostility and mistrust. A review of the Department of Health was commissioned by the Democratic-controlled legislature after the Republican Administration cut \$5.3 million from the agency's budget. The Governor publicly accused the legislature of ordering the review in order to embarrass the Administration, and ADH officials themselves viewed the entire exercise as a witch-hunt. By the end of the process, however, the ADH Director, Dr. Fay Boozman, endorsed both the Public Works report and the experience of working with our consultants.

Workforce Coordination and Oversight in New Mexico

To help New Mexico better understand the challenges posed by the New Economy, plan for urgent changes in educational systems, and produce better outcomes, Governor Bill Richardson ordered a complete overhaul of the state's workforce development system (an overhaul that Public Works helped to design). This required bringing together the resources of the state's economic and workforce development, secondary and post-secondary education, labor, and human and children's services agencies to build a pipeline of skilled workers in New Mexico.



To accomplish this, Governor Richardson established a Workforce Coordination and Oversight Committee and directed it to align the state's education and workforce development programming with the job demands of the state's current and future economy. This Committee included the Cabinet secretaries from all the executive agencies involved — as well as a few select representatives of the business and labor communities as well as the legislature. To make this high-level group work, the Governor required all principals to attend the regular monthly meetings themselves — and brought in Public Works to staff the effort, keep it moving forward, and help these diverse leaders to work together to achieve specific results on a tight timeframe.

To meet that challenge, the Committee began work on a blueprint for that new educational and workforce system. This led to the development of the Work in New Mexico Career Clusters initiative, which is designed to produce highly-skilled high school and college graduates who have the right skills to support New Mexico's high demand businesses.

Public Works assisted the Committee by identifying and gathering economic data that was needed to target high growth and high potential industries. **Public Works** staff facilitated focus groups with CEO's and senior managers from businesses across the state to gather input about workforce needs and opportunities in their industries and provided Committee members with research regarding best practices for workforce development from around the country.

Public Works helped transform committee decisions and input into an 80-page guidebook and website outlining each of these targeted industries and the pathways or education needed to have a career in one of these industries. Governor Richardson unveiled the Work in New Mexico Career Clusters Guidebook. "This guidebook is going to be the bible for job seekers," Governor Richardson said. "This simple guide outlines where the jobs are and what skills are needed to get these jobs. It is our goal to have this in the hands of everyone who wants to work in New Mexico."



1.7. References

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2. PROPOSED PERSONNEL

The team members described in this section bring to West Virginia an unprecedented array of experience in government and education. As noted in the overview of each firm, both **Public Works** and **MGT** have a core group of key consultants that are supplemented by a cadre of over 100 professionals who can be tapped depending on the specific topics of the review. The exact team configurations and number of team members will be submitted for state approval once final decisions are made concerning the scope of the review and what can realistically be accomplished within the timeframe outlined in the EOI.

Public Works Team

Eric B. Schnurer, Corporate Officer in Charge

J.D., Columbia University

M.A., Public Policy, Harvard University

B.A., Political Science, Brown University

Eric Schnurer, president of **Public Works**, has been helping governors and other high-level government decision-makers realize budgetary savings since 1993, when he served as chief-of-staff to the Acting Governor of Pennsylvania, and has since then helped make **Public Works** one of the leading firms in the country offering structured performance reviews of government agencies. As chief-of-staff, Mr. Schnurer personally oversaw design of the Acting Governor's budget proposal, including detailed savings across state government to pay for a large business tax cut. Since then, Schnurer has identified similar areas for budgetary savings for the governors of Arizona, New Mexico, Maine, West Virginia, Colorado, Iowa, and others. He has provided a wide range of consulting services to Governor's, agency heads and legislators in over half of the states in the United States.

Mr. Schnurer founded **Public Works** in 1995 and since 1997 has overseen **Public Works'** provision of performance review-related services to government agencies across the country. Most recently, Mr. Schnurer has served as partner-in-charge of the **Public Works** performance reviews in New Mexico, West Virginia and Colorado – which resulted in the firm's being asked to conduct a similar review of the New Mexico Public Education Department. He also was the responsible corporate manager for the review of the Arkansas Department of Health on behalf of the Arkansas legislature and of the "EdFund" of the California Student Aid Commission review. Eric will be the corporate Officer-in-Charge for this engagement.



Marion Reitz, Project Manager

MSW, Administration,
University of Pennsylvania

B.A., Psychology, Indiana
University

Marion Reitz has over twenty-nine years of experience managing and leading government agencies, as well as for-profit and not-for-profit organizations. Her work and experience has covered a wide-range of programs and government services, especially in the areas of health and human services, government contracting and procurement. Ms. Reitz's direct experience in managing public sector programs is coupled with her recent years of consulting work in the area of performance reviews, program design, operational analysis, fiscal operations reviews, government contracting and procurement processing. One of her most recent assignments was as a project leader for the Iowa Performance Review. She also was the Project Manager for the Louisiana Recovery School District Performance Review and provided consulting services to the New Jersey Department of Education, helping inner-city school districts review and improve management operations.

Before consulting, Ms. Reitz served for nine years as the Director of the Division of Family Development in New Jersey, responsible for all public assistance and child support programs for the state, managing a budget of \$1.2 billion and over 500 staff. She has been responsible for programs at the local level, working in Philadelphia as an Assistant Managing Director with the specific mission of creating interdisciplinary and interdepartmental solutions to health and human service needs not responding to categorical approaches.

Gloria Homer

B.A., Sociology, University of
North Carolina

Gloria Homer has over 30 years of experience in government finance and administration. She served as the Cabinet Secretary for the Delaware Division of Administration during which time she was responsible for all aspects of state procurement, contracting, fleet management, capital programs, state printing, strategic planning, and other state administrative responsibilities. Overseeing a budget of over \$100 million, she has received numerous awards for leadership and management, including having created the first Delaware Office of Minority and Women Business Enterprise.

While responsible for the Division of Administration, Ms. Homer conducted several performance reviews of agency operations and services, resulting in several improvements. Most notably, she consolidated fleet management, saving the state \$7 million in the first two years of operation, and restructured the Printing and Publishing Unit resulting in a positive cash flow. She also identified growing demands for services and was able to position the division to meet those demands.

Gloria was a key member of the Colorado and Iowa Performance Reviews; responsible for administrative functions, fleet management review and procurement review. She is also the founder of a K-12 charter school in Delaware.

Marion Reitz, Project Manager

MSW, Administration,
University of Pennsylvania

B.A., Psychology, Indiana
University

Marion Reitz has over twenty-nine years of experience managing and leading government agencies, as well as for-profit and not-for-profit organizations. Her work and experience has covered a wide-range of programs and government services, especially in the areas of health and human services, government contracting and procurement. Ms. Reitz's direct experience in managing public sector programs is coupled with her recent years of consulting work in the area of performance reviews, program design, operational analysis, fiscal operations reviews, government contracting and procurement processing. One of her most recent assignments was as a project leader for the Iowa Performance Review. She also was the Project Manager for the Louisiana Recovery School District Performance Review and provided consulting services to the New Jersey Department of Education, helping inner-city school districts review and improve management operations.

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Gloria Homer

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Shari Holland

M.A., Public Affairs,
University of Texas

B.A., Urban Affairs,
American University

Shari Holland has extensive experience reviewing public programs and making recommendations to public officials, leading organizations through the process of evaluating their internal processes and structures as well as the impact they have on their clients and customers. With a focus on the allocation of public funds, Ms. Holland works with clients to identify how funds are being used and whether the allocation of resources reflects the needs and priorities of the organization.

Ms. Holland has twenty years of experience evaluating public programs and their funding and presenting policy findings and recommendations to elected officials and public audiences. Ms. Holland served as an assistant to the Director of the Austin/Travis County Health and Human Services Department. In that position, she evaluated changes in administrative policies and organizational procedures, recommended improved management practices, facilitated staff work teams, and coordinated a large departmental reorganization. Before working in the City of Austin, Ms. Holland served as an analyst in the State of Texas Legislative Budget Office and later as a senior analyst at the Travis County Planning and Budget Office. Her responsibilities at Travis included monitoring revenues and expenditures, assisting departments in the preparation of their annual budgets, evaluating budget requests, coordinating and preparing bond issuances, developing a debt policy model, analyzing the fiscal impact of proposed legislation, and evaluating and monitoring programs and performance.

Robin Herskowitz

Graduate Studies, Public
Health, University of Texas

B.A., Psychology, University
of Texas

Robin Herskowitz has over 20 years experience in the area of public policy, and has a well-earned reputation for her innovative approaches to performance reviews. Prior to joining the private sector, Ms. Herskowitz worked as a Senior Policy Analyst with the Texas State Comptroller, where she led the groundbreaking performance reviews first begun in Texas. These reviews included specific recommendations to improve efficiency and save state taxpayers billions of dollars.

Ms. Herskowitz' project experience includes performance reviews of numerous state governments, health departments and health programs, as well as program evaluations, cost-benefit analyses, and health policy related research studies. She participated on the team to conduct the Iowa, Colorado and West Virginia Performance Reviews, participated in Phase I of the New Mexico review, and co-directed the second phase of the New Mexico Performance

Ms. Herskowitz directed our study examining the organizational performance of the Arkansas Department of Health and co-directed the West Virginia Performance Review.

Stephanie Walsh

M.A., Political Policy, Duke University

M.A., Secondary Education, University of New Hampshire

BS, Environmental Conservation, University of New Hampshire

Stephanie Walsh has over ten years of professional experience in the field of public policy research and budget analysis. Ms. Walsh previously served as Principal Legislative Analyst for the Colorado State Legislature, where her areas of responsibility included the Department of Regulatory Agencies, the Department of Public Health and Environment, the State Judiciary, and the Offices of Economic Development and Information Technology. Specific duties included evaluating program proposals, developing budget options, and presenting funding recommendations to the State Legislature's Joint Budget Committee. Ms. Walsh was responsible for the analysis of state agency budget requests and the compilation of funding recommendations totaling over \$400 million dollars annually.

While an Environmental Analyst for EC/R Incorporated, Ms. Walsh worked on several projects for the U.S. Environmental Protection Agency. Ms. Walsh also conducted research for the North Carolina Governor's Office on both brownfields redevelopment and growth management. She worked in the field of secondary education as middle school science teacher and she also researched and co-authored a State-sponsored handbook for educators cataloging public and private resources for homeless students.

Since joining Public Works, Ms. Walsh's work has spanned a diverse range of fields, including economic development, environmental conservation, clean energy, education, workforce development, and criminal justice. She has been responsible for the budgetary components of federal grant proposals. Additionally, she has worked with teams of consultants to conduct performance reviews to advise state government on best practices, recommendations for savings, improved performance, reduction in duplication of services, and consolidation of programs.

MGT Team

JoAnn Cox, Ed.D., Co-Project Manager

Ed.D, Education
Administration,
Florida State University

Ed.S, Education
Administration, Florida State
University

M.S, Education Administration,
Florida State University

B.S,
Education/Communication,
Florida State University

Dr. JoAnn Cox is an **MGT Senior Partner** and Director of PK-12 and Program Evaluation Services. She has held various positions in the field of education since 1978 (at local, district, and state levels) and has proven expertise in school district operational and performance audits, and in program evaluation, including K-12 curriculum, organization, management, alternative and special education, and accountability. Dr. Cox has extensive experience as the partner-in-charge managing talented and diverse teams of professional consultants, having directed or participated in over 150 school district studies and evaluations in 25 states. Recommendations from her projects have resulted in millions of dollars in savings for school districts across the nation. She is trained in Yellow Book auditing, is the primary

author of **MGT's Guidelines for Conducting Management and Performance Audits of School Districts©**, and is also the primary author of the instrumentation for **MGT's** school improvement projects.

Alan Pollock

M.A., Political Science and
Public Administration, The
University of Texas at Tyler

B.A., English, Texas Tech
University

An **MGT Senior Partner**, Mr. Alan Pollock has managed complex projects related to state and local government performance reviews and performance audits of state agencies, city and county departments, and school districts. In addition, he has worked with federal agencies to create performance-based organizations. Mr. Pollock has conducted policy research in the areas of state and local government fiscal policy, taxation, and regulatory practices. Mr. Pollock has held management positions in state government in which he directed divisions responsible for conducting legislatively mandated performance reviews, and research into fiscal tax policy, state tax burdens, as well as state and regional economic analysis.

Kathy Brooks

B. S, Communication
Studies,
Florida State University

Ms. Kathy Brooks is an **MGT Partner** and manager of **MGT's** technology outsourcing practice. Ms. Brooks has over 25 years experience in the private and public sectors working with educational, program, and financial data. She has directed or been a team member conducting performance audits and evaluations of school districts throughout the country. She is trained in Yellow Book auditing. Her experience includes teaching, training, application development, business analyses, system automation, security, data analyses, data research, data management, system and program evaluation, cash forecasting, data integration, data system conversions, and assessing the federal

standards along with any state rules and regulations. Ms. Brooks has over eight years of experience in data warehousing implementation; she was a member of the Florida Department of Education team (FDOE) that developed and implemented the first K-20 education data warehouse in the nation. While at FDOE, she was instrumental in a statewide help desk implementation.

R.S. Archibald, Ed.D.

Ed.D, Educational Leadership, Nova Southeastern University

M.Ed, EPDA Fellowship, University of Miami

B.S, Social Studies Education, Florida State University

Dr. Skip Archibald, **MGT** Senior Consultant, began his career as an educator in 1963. He has been a teacher, principal, assistant superintendent, and superintendent of Marion County School District (FL). Dr. Archibald has directed or participated in more than 25 organization, management, and efficiency reviews (including nine in Virginia) in districts with enrollments ranging from fewer than 2,000 to over 335,000 students. His areas of expertise include board-superintendent relations, strategic planning, policy and legal services, leadership and management, decision-making, human resources, community relations, and facilities development. While Superintendent, Dr. Archibald implemented study recommendations for a major interactive technology system, the overhaul of the 300-bus transportation system, and central office reorganization. Dr. Archibald was the project director and lead consultant in the recent internal audit of the human resources department for Colorado Springs School District 11, and project director and lead consultant in human resource/substitute teacher efficiency reviews of five Texas independent school districts. In June 2008 Dr. Archibald was awarded the Ocala-Silver Springs Rotary Community Service Award for leading in the development of the nation's second charter military academy.

G. Thomas Houlihan, Ed.D.

Ed.D, Educational Administration/Curriculum, University of North Carolina, Chapel Hill

M.Ed., Guidance and Personnel Services, North Carolina State University

B.S, History/Psychology, Indiana University

Dr. Houlihan has more than 37 years of experience in education, including Senior Education Advisor to the Governor of North Carolina. With a background as a teacher, high school principal and school district superintendent, Dr. Houlihan is the first educator to hold Cabinet level status in a North Carolina Governor's administration. In his role as Senior Education Advisor to Governor James B. Hunt, he served as the chief policymaking advisor in education, led the implementation of the Excellent Schools Act and coordinated the Governor's involvement with the National Education Summit, Achieve, National Governor's Association- education initiatives, and the Education Commission of the States. He also provided a national leadership role as Executive Director of the Council of Chief State School Officers for five years. Prior to serving CCSSO, Dr. Houlihan was President/CEO of the North Carolina Partnership for Excellence. An author and frequent speaker/consultant, he was selected "Superintendent of the Year" in North Carolina and was one of four finalists for national "Superintendent of the Year."

Robert E. Schiller, Ed.D.

Ed.D., Organizational
Leadership, University of
Pennsylvania

M.S., Organizational
Leadership, University of
Pennsylvania

M.A., English, University of
Mississippi

B.A., Economics, Upsala
College

Dr. Schiller has extensive large school district and large state experience spanning 35 years. Dr. Schiller served as the State Superintendent of Education in Illinois and Michigan, and as Deputy State Superintendent of Education in Louisiana and Delaware. In Illinois, Michigan, and Louisiana, he held the dual role of State Superintendent and Chief Financial Officer. While serving as Chairman of the Illinois State Teachers Retirement System, he also chaired the Investment and Finance Committee. Dr. Schiller also served as a Superintendent and Chief Financial Officer of five school districts in New Jersey, Louisiana, and Maryland, including as the Interim CFO and Chief Executive Officer of Baltimore City School District for sixteen months at the request of the Governor of Maryland during the state intervention in that district. He has served as the (Interim) Senior Deputy Superintendent for the Los Angeles Unified School District in 2008-09.

Henry Louis Johnson, Ed.D.

Ed.D. and Ed.S., School
Administration, North
Carolina State University

M.A.T., Science Education,
University of North Carolina

B.S., Biology, Livingstone
College

Dr. Henry Johnson has broad experience in educational administration and oversight, having served as Assistant Secretary of the U.S. Department of Education from 2005-2007. Previously, Dr. Johnson has served as a teacher, principal, superintendent, and educational consultant for a variety of state and local school systems throughout North Carolina. He currently serves as Senior Advisor for Baker and Daniels Educational Consulting in Washington D.C. Dr. Johnson's areas of expertise include school accountability and improvement strategies, gifted education, and effective teaching. He has been involved in organizational performance reviews, public policy reviews developing legislative recommendations, researching public policy and advising top-level governmental officials. Dr. Johnson was recognized in 2006 by the North Carolina State Board of Education with the Leadership Award for Raising Achievement and Closing Gaps Programs.

Brian Talbott, Ph.D.

Ph.D., Education
Administration, University
of Idaho

M.S., Education
Administration, Seattle
University

B.S., Secondary Education,
University of Washington

Dr. Talbott has over 40 years of experience in education including executive director of the Association of Education Service Agencies (AESA). AESA is the professional association that serves the 554 Educational Service Agencies in 45 states. He is responsible for strengthening the agencies by providing professional growth opportunities, technical assistance and research. Dr. Talbott has been a member of the Universal Service Administrative Company Board, the Superintendent of ESD 101 in Spokane, WA., and Yakima, WA. He is also the recipient of state and national

awards including the National Association of Media and Technology Centers Partner in Excellence Award, Washington Association of School Administrators Golden Gavel Award, and the National Association of Education Office Professionals National Administrator of the year.

Michael Ward, Ed.D.

Ed. D., Educational Administration, North Carolina State University

M. Ed., Occupational Education, North Carolina State University

B. S., Vocational/Technical Education, North Carolina State University

From 1997 through 2004, Dr. Michael Ward served as State Superintendent of the North Carolina Department of Public Instruction, following an extensive career in educational administration including service as the Executive Director of the North Carolina Standards Board for Public School Administration, Superintendent of Granville County Schools, Principal, and Assistant Principal in school districts throughout North Carolina. For the past five years, Dr. Ward has served as an educational consultant and a member of the Educational Leadership faculty of the University of Southern Mississippi. His areas of expertise include on-line instruction, disaster preparedness and recovery, and the role of education in promoting wellness. Dr. Ward has provided testimony to the U.S. Congress on issues such as educational assessment and research. The governor of North Carolina awarded Dr. Ward the Order of the Long Leaf Pine in 2004, the state's highest civilian honor, recognizing his extraordinary service to the state as a champion of education.

Walt Rulfes, Ph.D.

Ph.D, Educational Leadership, Gonzaga University

M.B.A., Business and Finance, Gonzaga University

B.A., Accounting and Finance, University of Washington

Dr. Walt Rulfes led Clark County School District (NV) from 2005 to 2010. Districts from across the country send representatives for a closer look at Clark County's prototype designs for energy-efficient schools, its career and technical academies and the district's music program among other programs that are widely considered one of the best in the nation. He has led the Clark County School District through some of its toughest times. Dr. Rulfes has been committed to improving graduation rates and dropout rates through innovative programs, such as Empowerment Schools and career and technical academies. His reforms and accomplishments have been recognized nationally; Dr. Rulfes is the recipient of numerous awards including the 2009 State Superintendent of the Year Award, the Hispanic Community 2009 Distinguished Educator Award, and numerous other prestigious awards from the Council of Great City Schools.

Ronald Fielder, Ph.D.

Ph.D., Education
Administration, Kansas
State University

M.S., Special
Education/School
Administration, Fort Hays
State University

B.S., Psychology/Special
Education, Fort Hays State
University

Dr. Fielder has over 20 years of experience as the chief executive officer of a large regional education service agency in Iowa, providing a full range of education support services to 33 public school districts and several private schools. Dr. Fielder is often called upon to consult with colleagues in the nation's ESAs. He has served nationally as a member of the executive council of the Association of Education Service Agencies (AESA), and was awarded their highest honor, the Justus Prentice Award. For the past 15 years, Dr. Fielder has served as a consultant and facilitator to a wide variety of public and private sector organizations. This work has included strategic planning, systems design, problem solving, conflict resolution, program evaluation, and team building.

Jerry Williams, C.P.A.

B.S. Business Administration
and Accounting, Tarleton
State University

Mr. Williams has over 30 years in management, performance analyses, finance and audit in the public sector. He has worked on numerous MGT efficiency reviews, including for the Los Angeles Unified School District, where he reviewed of organization, staffing, and payroll operations, and a special education program and services review for Washington Elementary Public Schools (AZ), where he reviewed budgeting, management reporting, revenues, and purchasing. In the Texas Comptroller's School Performance Review and Local Government Assistance program, he managed and performed school district, community college, city and county reviews. Prior to joining the Texas Comptroller's Office, he was responsible for directing the facilities maintenance, construction, financial, vehicle, travel, federal surplus property, human resources, purchasing and central support functions for a Texas state agency while serving as the agency's Deputy Executive Director and Director of Finance.

Dan Cochran, Ed.S.

Post-Graduate, Human
Resources, Georgia State
University

Ed.S, Georgia State
University

M.S, University of Tennessee

B.S, University of Tennessee

Dr. Cochran has over 25 years of experience specializing in human resources in large urban school districts. As Chief Human Resources Officer for Broward County School District (FL), he reengineered an eight-department division for improved efficiency of operations and reduction in cost, and refocused workforce and leadership staff on customer service and support. Dr. Cochran has conducted human resources audits of three large urban school districts, including Los Angeles, San Diego, and Charlotte (NC), in conjunction with the Council of Great City Schools. Dr. Cochran's experience includes human resources audits, strategic planning, compensation studies and design, recruitment, certification, evaluation, performance planning and development.



In addition to the key team members listed above, **MGT** has the following personnel available for this engagement. Final team composition will be determined when the scope of work has been agreed upon and finalized.

MGT Team Member	Area(s) of Expertise	Brief Description of Qualifications and Experience
Ed Humble, Ph.D.	Facilities District administration	30 years of experience in education as a teacher, principal, superintendent, and educational planner; helps districts find creative ways to address inequities in building utilization. Project director on numerous districtwide facility master planning projects
Dodds Cromwell, AIA; M.Ed.	Facilities	Specializes in facility assessment and planning services; particularly for public school districts, college and universities, state and local governments, and non-profit entities. Licensed architect.
Mary McKeown-Moak, Ph.D.	Policy Funding Strategic planning	40 years of experience as an educational administrator with school districts, boards of education, universities, regents, state legislatures, executive offices and non-profit agencies. Developed funding formulas for universities, community colleges, special education, pupil transportation and school aid.
William Carnes, Ed.D.	District administration Facilities	30 years of education experience, from classroom teacher to superintendent. Concentration on facilities master planning, school consolidations, strategic planning.
Reginald Smith, B.S.	Financial operations	Manager of MGT's procurement review practice. Assists with school district performance audits responsible for purchasing, warehousing, contract management, and inventory control.
Natacha Palaez-Wagner, M.Ed.	District administration Strategic planning Educational programs	30 years experience including management and administration of public sector programs and non-profit organizations, project development and management, strategic planning, and public school and community college education. Bilingual skills.
Patricia C. Davis, M.Ed.	Educational programs Special education	30 years experience in public education in program design and evaluation, administration, compliance with state and federal requirements, and teaching elementary, middle, general and special education in the schools and in undergraduate and graduate classrooms.
Suzanne Bradford, C.P.A.	Financial Management Technology	22 years of experience in financial and accounting, including school district business operations (financial management, purchasing, and risk assessment).
Susan Zoller, M.S.	District administration Educational programs Facilities	Over 35 years of experience as a teacher, principal, curriculum director and deputy superintendent in Washington and Idaho. Extensive education facility experience used on facility planning projects across the country.

MGT Team Member	Area(s) of Expertise	Brief Description of Qualifications and Experience
Wayne Lett, Ed.D.	District administration Business operations Facilities Technology	Retired superintendent with 34 years of public education experience. Significant capital improvement experience, winning the AASA Design Award for best high school design. Implemented \$40 million technology plan for the district and responsible for all business operations.
Steve Nettles, Ph.D.	Transportation Food Services Safety and Security	Experienced in K-12 education at both the school and district levels, including teacher, administrator, district program evaluator and university faculty member; has been responsible for performance reviews of transportation policies, procedures, practices, operations, routing, staffing, and fiscal management, school and district safety and security, and food services delivery and operations.
Frank Till, Ed.D.	District administration	Over 30 years experience as a teacher, administrator and deputy superintendent in San Diego City Schools and Superintendent of Broward County Schools (FL); received 20 major awards as a superintendent and was selected to represent the U.S. in several educational summits in England, Germany, and France.
Don Oatman, C.P.A.	Financial management	40 years experience in local government and public schools, including consulting since 1999. Served in educational administration for over 20 years, including business operations, safety and security, and facilities. Has served on more than 15 MGT school district projects primarily reviewing financial matters and fiscal operations.
Geoffrey Fletcher, Ed.D.	Technology	30 years experience in administrative and instructional technology for all levels of education systems. Editorial Director for <i>T.H.E. Journal</i> and Editor for special projects for <i>Campus Technology</i> . With MGT, has performed administrative and information technology operational, management and efficiency reviews.
David Brittain, M.S.	Technology	Recognized nationally as a leading expert in education technology. Past president of the International Society for Technology in Education and the National Educational Computing Association. Retired director of MGT's Educational Technology Practice and serving as Executive Director of the Learning Technology Evaluation Center.
Robin Tennille, M.A.	Food services	Small business owner with over 14 years experience in school food management and implementation. Has conducted numerous CRE reviews of sponsors of the NLSP, SBP, and ASSP. She has performed several school district food service reviews for MGT.

MGT Team Member	Area(s) of Expertise	Brief Description of Qualifications and Experience
Harold Grimes, B.S.	Transportation	30 years experience in school district transportation, including 20 years as director of school transportation services in Virginia school districts. Mr. Grimes has participated in transportation reviews in Virginia, Georgia, and Texas for MGT.
James Brown, Ph.D.	District administration Educational programs Human resources	41 years experience in the field of education. As a Deputy Superintendent in was responsible for planning, developing, implementing and evaluating all district instructional programs. As Assistant Superintendent was responsible for overall operation of administrative services, including safety, transportation, human resources, and food services.
John Hazelette, B.A.	Transportation	25 years of experience in public school transportation including fleet maintenance and emergency response operations. With MGT has reviewed transportation services and management.
Marisa Weisinger, Certified TAPT	Transportation	15 years of school transportation experience from training through Assistant Director, Interim Director, and Director of Transportation.
Dan Roberts, Certified TAPT	Transportation	Director of Transportation for Round Rock ISD. 35 years experience in school transportation. Provided consulting services to many Texas ISDs as well as districts in Florida, Pennsylvania, Ohio, New York and Utah.
Brian Archer Weisinger, Certified TAPT	Transportation	Director of Transportation for Spring ISD. Certified Texas Association Pupil Transportation Professional, Texas A&M TEEX School Bus Driver Trainer, Texas Department of Public Safety School Bus Driver, US Department of Transportation Bus Accident Investigator, Ron Turly Associates Fleet Management Supervisor, Texas Department of Transportation Brake Inspector
Jaime Gallego, B.A.	Transportation	30 years experience in school transportation including Humble ISD Director of Transportation. Developed first two electric battery powered school buses in Texas.
Kelley Brock, Ph.D.	Educational programs Special education	20 years experience in education from classroom teacher to executive of education companies, president and founder of Absolute Success. Extensive PK-12 operations and organizational development experience with in-depth knowledge of issues including special education, program/compliance review, teacher quality, Title 1 and school turnaround.
Doug Vaughan, M.A.	Food services	25 years experience in management of Child Nutrition Programs as Director of Business Affairs and Director of child Nutrition. Responsible for reviewing food service department operations in MGT efficiency reviews.



MGT Team Member	Area(s) of Expertise	Brief Description of Qualifications and Experience
H. Charles Woodruff, M.A.	Financial management	Extensive experience in education funding and staffing while serving as a school district CFO. Expert on the restriction on use of school division financial management, purchasing, warehousing, fixed assets, and special education funds.
George Ann Rice, J.D., Ed.D.	Human resources Legal services Policy Strategic Planning	Retired associate superintendent, Human Resources Division, and chief negotiator of the Clark County School District in Las Vegas. Nationally recognized expert in the field of personnel development and creating connections between local school districts and surrounding communities.
John Fagan, Ed.D.	District administration	40 years experience in school district and higher education governance and administration from classroom teacher to superintendent of schools. Significant expertise in organizational structure and change, operations managed by an executive team, and diversity.
Steven Staples, Ed.S.	State Policy State Strategic planning District administration	30 years of school division experience including 17 as superintendent of schools. On the faculty at William and Mary in the School of Education, in Educational Policy, Planning and Leadership Department. Also consults on new superintendent mentoring, staffing, professional development, and attendance boundaries. Selected as National Administrator of the Year and Virginia Superintendent of the Year.
Fred Kauffman, M.S.	Technology	35 years experience in IT executive leadership, program/project management, ITIL implementation, security compliance, business continuity, and process improvement. Long-term Director of MIS for the Broward county School Board (Fl). Has conducted onsite technology reviews including the Hong Kong School District and Hillsborough County Public Schools
David Brewer, M.A.	District administration Policy Strategic planning	Former Superintendent of Los Angeles Unified School District. Managed over 700,000 students, 800 schools and a \$7 billion annual budget. Oversaw the largest construction and renovation initiative in the district's history and several academic achievements.
David Palmer	Transportation	28 years experience in district transportation with Los Angeles Unified School District. Served as the Technical lead on a Transportation Technical Support Assistance Team for the Council of Great City Schools.

MGT Team Member	Area(s) of Expertise	Brief Description of Qualifications and Experience
Thomas Norris, Ed.D.	Strategic planning Policy Regional Service Centers Educational programs District administration	33 years experience in education from classroom teacher , superintendent of schools, regional service center executive director. Developed a methodology for measurable strategic plans, established a three year system for program evaluation, and implemented curriculum auditing. Extensive expertise in regional programs and support services.
Lynn Wicker, Ed.D.	School administration Human resources	Extensive experience in educational administration, human resources procedures and coordination, and data collections and analysis.
Millie Klein, Ed.D.	State policy and planning Regional Service Centers District administration Human resources Educational programs Facilities	Regional education service associate director, managing projects with the Texas Education Agency, leading strategic planning efforts for over 30 districts, and developing a best practices clearinghouse in the areas of instruction, business, and finance. Consultant on state education policy and planning.
Charles Anderson, M.A.	Facilities Transportation	K-12 education experience includes teacher, principal, transportation director, and superintendent. Teaches School Law as an adjunct faculty member.
Doris Durant Delaney, Ed.D.	Policy Strategic planning Regional Service Centers Educational programs	Regional deputy executive director of state and federal programs, focused on improved math and science achievement; district administrator for Broad Prize for Urban Education. Experience as superintendent, principal, counselor, and teacher.
Lee Warne, M.Ed.	Educational programs Regional Service Centers Policy	Former superintendent, principal, and teacher, strong experience in school district reorganization and enrollment issues, shared services, and collaborative regional education service centers.
Christopher Andrews, B.A.	Transportation	Experience in efficiency studies of school district transportation programs, including policy, procedures, routing, staffing, fleet, labor, and maintenance.
Linda Villarreal, Ed.D.	Regional Service Centers Educational programs Financial management Policy	Executive director of regional education service center, proven expertise in education service delivery and instructional services, large instructional budgets, academic performance aligned with economy and efficiency of operations. Bilingual skills.
Leslie Bennett, Ed.D.	Educational programs Special education Regional Service Centers	Experience and focus on academic improvement for special students, former teacher, educational diagnostician, and principal.

MGT Team Member	Area(s) of Expertise	Brief Description of Qualifications and Experience
John Dietz, M.A.	Financial management All non-instructional operations	Chief financial officer of three school districts, chief negotiator on union contracts; advisor to the Public Employee Relations Commission and the Unemployment Commission. Chief business and operations office for all non-instructional programs.
Barbara Dillgard, Ph.D.	District administration School improvement Educational programs Human resources Community relations	Extensive experience in educational leadership as deputy and associate superintendent, and executive director and director, working with constituent districts for all student learning services.
Jerry Gee, Ph.D.	Facilities	Experience as chief academic officer, operations director including facilities, staff, budgets, and educational programs.
James Hamilton, Ph.D.	District administration Educational programs Facilities Financial management	Multiple superintendent, principal, and teaching experiences, recognized for best financial practices in Hillsborough County School District (FL) by the Florida Legislature.
Steve Hyden, Ed.D.	District administration Technology Regional Service Centers	Superintendent and executive director for very large school districts. With a strong background in educational information systems and technology, directed the expansion of programming in curriculum development and delivery through advanced technology, and implemented broad band connectivity among regional service centers.
Thelma Jackson, Ed.D.	Policy Strategic planning Community Involvement	Experience in education change initiatives, restructuring and reform, community mobilization, policy, strategic planning, school improvement, and educational transformation. Served on task forces and advisory councils for four former governors of Washington state.
Ron McLeod, Ed.D.	District Administration	Retired superintendent of districts in Colorado and Texas, with over 40 years experience in education; highly successful in funding facilities projects, and has special interest in consulting in districts serving diverse student populations.
Agustin Orci, Ed.D.	District Administration Educational programs	Former superintendent in Texas and Arizona, and the Superintendent of the Year in Arizona; deputy superintendent of instruction in Clark County School District, NV, with full responsibility for the administration of five regions. Recipient of Lifetime Achievement Award in 2005 for his work in education in Nevada.
Nancie Lightner, Ed.D.	District administration Community relations Educational programs School improvement	Former superintendent and principal, experienced in and focused on community communications, accountability, and student achievement.

MGT Team Member	Area(s) of Expertise	Brief Description of Qualifications and Experience
Milton Liverman, Ed.D.	State policy State strategic planning District administration	Executive Officer of the Committee of Superintendents for the Southeastern Cooperative Educational Programs, member of the State Superintendent's Leadership Advisory Council, and former school district superintendent.
Garreth Schneider, Ed.D.	Educational programs School improvement	Consultant on low performing schools, student performance data, and school improvement planning. Evaluates classroom practices, and advises on standards-based curriculum and instructional strategies. Former teacher, principal, and district director of curriculum and instruction.
Kathryn Schneider, Ed.D.	Educational programs School improvement	District Assistance Intervention Team (DAIT) certified; former teacher, principal, area administrator, assistant superintendent, principal coach. Responsible for evaluating school programs and practices to identify curriculum and systemic needs to raise achievement levels.
Dave Teater, Ed.S.	District administration Facilities Community involvement	Former superintendent and educational planner, with direct supervisory experience for major construction or renovation projects, and long-range school facility planning services. He has extensive experience working with school boards and citizen advisory committees.
Bruce Venter, Ed.D.	Financial management Business operations Educational programs	Experienced assistant superintendent and chief business officer, responsible for all business activities including budgeting, finance, accounting, auditing, payroll and employee benefits, purchasing, transportation, school facilities and construction, food service, and collective bargaining. Responsible for student services, special education, career and technical education, adult education, and information technology
Charles Woodruff, M.S.	Financial management Transportation	Over 25 years of education funding and staffing experience as chief financial officer, also expert on purchasing, warehousing, fixed assets, special education funding. Also significant transportation services experience as deputy general manager of a large metropolitan area transit authority.
Richard Arndt, Ph.D.	Strategic planning Administrative information systems Human resources	Experience at the university level for long term planning and day-to-day process coordination of administration information systems (including recruiting and admissions). Former teacher and administrator, with experience in human resources, fiscal management, community relations, and curriculum.



MGT Team Member	Area(s) of Expertise	Brief Description of Qualifications and Experience
Michael Baumann, M.S.	Financial management Human resources	Experienced school district chief business officer, managing and directing the finance operations and the human resources department; provide strategic guidance, labor negotiations, and budgeting.
Guy Mehula, M.S.	Facilities	Lead the largest public construction program in the nation and the facilities services division at the second largest school district nationally (Los Angeles Unified); managed the bond program that built more than 300 new school projects and completed more than 20,000 repair projects modernizing 850 schools.
Suzanne Creasey, Ph.D.	Educational programs Special education Policy	Experienced in educational policy, planning, and leadership, with special focus on special education, students with disabilities, and student services, dispute resolution, and administrative services.



3. PROJECT PLAN

The Performance Review model used by Public Works and MGT and described in this proposal is a highly interactive, focused and rigorous process to identify practical, realistic efficiencies that have a high probability of successful implementation. As former high-level government managers and education professionals, our team prides itself on producing real solutions that can help the State of West Virginia eliminate duplication of effort and redundancies, identify economies of scale, and find ways to operate more efficiently.

Our Performance Review model is highly adaptable so that whether we are reviewing state-level departments, major cross-department functions, RESAs or local districts, many of the same tasks are involved. The model will be adapted to review the wide range of operations – the Department of Education, Department of Education and the Arts, Center for Professional Development, Board of Education, Regional Education Service Agencies, and county Boards of Education – all possible subjects for this efficiency review.

First and foremost, we know to engage the leaders, the managers, and the people who do the work and have the hands-on experience – to ensure that we fully understand the historical context of each function or program under review – while bringing to bear *our* experience from around the country in identifying leading benchmarks and best practices. We know the rigorous financial analysis that must be “bullet proof” in support of any findings and recommendations. We know the need for positive legislative involvement – and how to work with members of the legislature to achieve it – in order to ensure that recommendations requiring statutory changes can be realistically targeted for implementation. Finally, we know that the final product must be understandable to the people affected by the recommendations and to the public. All of these elements are a part of every Performance Review we have conducted around the country.

We understand the added organizational complexities of education systems that by necessity must encompass significant state-level oversight and direction while allowing for the autonomy of local boards to direct districts and schools to achieve goals established at the federal and state levels. We understand how money flows, what authority is entrusted to each level of the operations, what responsibility each entity has, and most importantly, how the system must work together for the benefit of the thousands of students who must be educated for the 21st century. As in most, if not all states, West Virginia spending on education far outstrips any other spending category. West Virginia is taking a positive, though difficult, step to challenge all levels of the educational system to work more efficiently and effectively.

3.1. Approach

As noted earlier, while each team will include both Public Works and MGT consultants, Public Works will take the lead at the state level, while MGT will lead the teams



reviewing the RESAs and county boards. We recognize the extremely ambitious schedule the state has set and are prepared to commit the necessary resources to this engagement to complete the type of review necessary to achieve desired results. We expect, however, that the state will negotiate a scope and schedule as described in the EOI. At that time, additional details will be presented to determine the resources and timeline to review state, regional and local operations.

Task 1: Project Initiation and Setting of Priorities

We begin every engagement with a “kick-off” meeting to ensure that the goals, objectives and details of project implementation are adequately defined and understood. For this engagement, this will include the discussions described in the EOI for the state to “commence scope of service and price negotiations” with the most qualified firm. Anticipating that we will reach agreement on the scope and cost of the review, we will immediately take action to launch the work outlined in our model. At this time, we will present to the state the teams and timeline to meet the negotiated scope. We understand this may include state-level departments, REdSAs and/or county boards of education.

For education departments, regional services and school districts, we typically look across the board at administrative and management operations to determine how “back office” functions are provided, and most especially, to look for ways that these functions can be accomplished more efficiently and effectively. While we will work with the Project Manager to determine the areas for review, we would expect them to include (but not necessarily be limited to):

- Overall department, regional and district management;
- Facilities use, management and custodial;
- Purchasing;
- Warehousing;
- Food Services;
- Transportation;
- Safety and security;
- Human Resources, and;
- Information technology used for administration and management.

Since this review requires investigation of state-level, regional and district operations in a very aggressive timeframe, we will review our preliminary plan and work with the Governor’s Office and Department of Education to refine our approach, timeline for tasks, and agreement on scope at this very first meeting. As shown in more detail in *Section 3.2 Timeline*, we will outline the level of effort and timeline to accomplish all tasks required to meet the agreed-upon scope of work. At this time we also will form highly-skilled teams for state approval. Again, Public Works will lead teams looking at state-level departments and programs; MGT will lead teams for the review of RESAs and local districts. While we have sufficient consultant resources to address a broad scope of work, we note that reviews of multiple levels of operations that include state,



regional and local school districts typically take at least one year to complete. We strongly recommend, therefore, that the state consider ways to phase in this review, perhaps starting with all state-level departments and a *sample* of RESAs and local districts; the latter would also help inform the recommendations on the state level.

We also regularly encourage establishment of a Project Manager or single point-of-contact. We have found that this assignment is critical to the success of such projects.

We also encourage the identification of a point-of-contact for each unit and/or function being reviewed so that data collection, interview schedules and analysis can be completed as expeditiously as possible. We believe that relationships and communications are vital components of successful reviews and constitute a foundation that must be laid starting from day one. At the initial planning meeting, we will establish these lines of communication and the mechanisms that meet the need of the Project Manager and the entire team.

Task 2: Review All Relevant Data, Reports and Background

For this task, the Public Works and MGT consulting teams first develop a thorough understanding of the organization, program or function being reviewed. The first step after project kick-off is to collect organization-, program- or function-specific data and documents. It is critical for the team to establish a baseline understanding of the size, structure, and purpose of the programs/functions being reviewed. During this component of data collection, we will review data and findings of previous reviews conducted, if any, and build upon the recommendations implemented in those efforts.

Once a focus for review is established, our consulting team first develops a thorough understanding of the service, program, department(s) or function being reviewed. The first step after project kick-off is to collect department, program or functional area specific data and documents. It is critical for the team to establish a baseline understanding of the size, structure, and purpose of the programs or functions being reviewed. During this component of data collection, we will review the data and findings of previous Performance Reviews conducted in West Virginia and build upon the recommendations implemented in those efforts.

For this task we will:

- Prepare and distribute requests for documentation and data for the project teams to understand the structures, responsibilities, operations, personnel, funding, management systems, facilities, and assets of the state departments, RESAs and districts that are the focus of the review.
- Review and analyze materials submitted.
- Prepare a brief summary profile of each program/function under review including, as appropriate, such items as:

- Stated responsibilities,
 - Performance and workload measures,
 - Operational policies, procedures, and processes,
 - Automated systems,
 - Staffing levels,
 - Budgeted expenditure levels,
 - Interactions with “customers”, both internal and external,
 - Interactions with other governmental agencies, and
 - Issues and recommendations identified in previous studies.
- Isolate areas such as performance indicators, expenditures, staffing levels, etc., that will constitute the foundation of best practices and benchmarking research.

Task 3: Conduct Benchmarking Research and Analysis

We will work closely with the Project Manager and points-of-contact to review the information collected in Tasks 1 and 2 to form the basis for determining benchmarking requirements. Once this is determined, our extensive knowledge of national best-practices (in part from conducting similar reviews around the country), our experience implementing such best-practices, our understanding of professional standards, as well as our ability to research specific areas as needed, will inform our thinking and become part of the preliminary formation of issues and possible solutions.

We will:

- Identify appropriate national and other recognized benchmarks, standards and best practices for measuring the programs/functions identified in Steps 1 and 2.
- Examine the organizational and management structure of departments/programs/districts elsewhere of similar mandate, size, and to the degree possible, with similar potential near-term growth.
- Assess the applicability of practices in other jurisdictions, and identify those practices that would be effective if adapted to West Virginia.
- Develop draft findings and preliminary recommendations concerning core operations of the targeted functions and/or programs based on benchmarking, best practices analysis, and cost-benefits analysis.

Task 4: Conduct On-Site Research and Diagnostic Assessment

For this step in the investigation, we conduct on-site visits and interview key managers, supervisors and employees both in individual and small group meetings. We will work with the Project Manager and contacts at each site to identify the appropriate people to interview. We will work closely with the Project Manager to ensure that employees play



a key role in our work as we build upon their historical insights and welcome their ideas for improved service delivery. As part of our interview process, we will identify existing practices, legislative history, and legal, regulatory, and budgetary constraints faced by departments or functions over recent years.

The following types of issues will be considered, as appropriate:

- Organizational structure, layers of management, and functional alignment;
- Span of control, supervisor-to-staff ratio, staffing allocation, and staffing patterns;
- Management of workload and efficiency of workflow;
- Identification of processing backlogs;
- Progress at meeting goals and objectives in statute, regulations and agency strategic plans;
- Identification of operational duplications, gaps, or other inefficiencies;
- Adequacy and use of information technology; and

Based on this information, we will identify the core work processes in the department, functional area or school district and develop high-level process maps. For each department/function/district, we will:

- Determine where inadequate performance exists, identify the causes for inadequate performance, and identify gaps and/or duplication. The causes may include but not be limited to:
 - Inappropriate or inefficient organizational structure or alignment;
 - Lack of meaningful performance or accountability measures;
 - Lack of automation or use of technology; or
 - Inefficient or ineffective business practices, including faulty internal controls, inconsistent or poorly documented procedures, inadequate internal communications, problems with employee morale or motivation, or lack of flexibility to meet stated needs.
- Determine the degree to which each department/functional/district is meeting its objectives and goals. Identify activities that add value and those that do not add value.
- Consider whether activities are in compliance with appropriate laws and regulations and the degree to which managers and staff are held accountable.

We conduct interviews with department heads, middle managers and line staff with relevant knowledge about the program or issue being examined. Depending on the interviewee and purpose, we conduct one-on-one interviews, small group meetings or focus groups in order to obtain the broadest input into the area of operations being reviewed. This combination of individual and small group interviews and focus groups gives us an across-the-board view of a department, program or function. We find time and again that this broad input always provides information that is relevant and important for the formulation of the most realistic analysis of issues and possible solutions. These interviews provide many and varied opportunities to gather insights and ideas from employees.

We define stakeholder in a very broad sense – employees have as much “stake” in what happens in a program or department in which they work as do advocates, the legislature or other groups. Our activities, therefore, to obtain stakeholder input are varied. We obtain stakeholder input through: individual and small group interviews with agency heads, managers and line-staff; focus groups; e-surveys; public hearings; and interviews with advocates and other interested parties. We will work closely with the Governor’s Office and Department of Education to decide whom to involve and how to gather input to ensure we are sensitive to any issues that might arise in conducting such a broad outreach.

Task 5: Prepare Preliminary Findings, Recommendations and Implementation Plans

During this task, we will consolidate the initial findings and recommendations for each department/function/district into an “issues docket.” The issues docket lists initial findings and recommendations to improve efficiency and effectiveness of and to streamline core processes, service delivery, and other critical operations. For each item on the issues docket, we examine law, current practices, and current budget constraints, including the relevant limitations in existing county, state and federal budget, tax, and expenditure laws.

Once the issues docket is compiled, we will present our initial findings and recommendations to the Project Manager and others as identified by the Governor’s Office, DOE or district management during a “tollgate” meeting. Such “tollgates” – formal meetings held to review preliminary findings and recommendations with key decision-makers – greatly enhance the quality of the final work product: Preliminary findings and recommendations can be “vetted” by this high-level group during a highly-interactive meeting, and this group can provide a fresh look at not just the recommendations but also the adequacy of the documentation and analyses supporting them. Most importantly, these “tollgates” help us to achieve a consensus on what issues and recommendations to pursue and which ought to be dropped at this point.

Once decisions are made on which recommendations will go forward, we focus on completing those issues for eventual inclusion in the final report.

The end result of any performance review is a series of realistic recommendations that can be implemented to save money, improve efficiency or increase non-tax revenue. It is important, therefore, that recommendations are based on a thorough review of operations, financials, history, and precedent. We go through an interactive seven step process to collect information and analyze data in order to produce recommendations that address real problems and real solutions.

Ideas are gathered from a variety of sources including the background research, constituent information, issues that have been in the press, or an understanding of what other jurisdictions may be doing. A “docket” is developed that is basically a list of every idea gathered during the research phase. Often briefing sheets are developed for each

issue that identifies: background information, statement of the problem, and expected result or benefit.

As issues are identified, decisions are made about what is open for consideration as well as time requirements, resources, and expertise needed to fully investigate an issue. Most importantly, the team determines whether significant information on the issue is available from existing sources or whether original research is required. The topic also is re-examined to determine whether the real problem is what it was originally thought to be. It is important to focus on the right issue, making sure that looking too narrowly at an issue does not miss a broader question. At this stage, it is also common for an analysis to uncover opportunities not originally anticipated. These new ideas are factored into the scope of the review.

Finally, it is important to consider the political climate in which the review is taking place. No matter how valid a recommendation or how thorough the analysis, some approaches may not be politically possible or may require a degree of public education before they are made public. Decisions on which issues to finally pursue are made based on many factors including their potential for success. At the same time, ideas are not discarded simply because they failed in the past. Understanding the history of related efforts may provide the information the team needs to reframe proposals in a way that may ensure their success.

The goal of this phase is to identify recommendations for review that offer opportunities for improvement. Sufficient analysis is conducted to make informed decisions about going forward with the idea or eliminating it from further review. Often brainstorming sessions are used at this stage to allow for a free exchange of ideas and opinions. It is at this stage that the Public Works and MGT teams work closely together to share insights and observations from the review of the entire system in order to make recommendations that will improve operations for the entire system.

We have extensive experience developing implementation plans and timelines to achieve desired results. Developing implementation plans to accompany report recommendations requires an understanding of the fiscal and personnel constraints relevant to the issue being addressed, and an ability to prioritize the steps necessary to accomplish the end goal.

When developing recommendations we always keep the end in mind – that is, what will it take to realize the estimated savings, improved customer service or greater efficiency. As part of our diagnostic assessment, we ask questions, not only about how a process currently works, but also what would happen if the process were to change and further, if a change were to occur, who should be responsible for the revised process.

All recommendations include a clear statement of anticipated outcomes and include major milestones and schedule for implementation. This usually includes:

- What underlying authority is needed? Can the recommendation be implemented by change of procedures, regulations, Executive Order or legislation?
- Who is responsible for carrying out the plan?



- What are the major steps required?
- What is the timeframe for major milestones and complete implementation?

We believe so strongly in the need to ensure recommendations are actually implemented, and not just collecting dust in a report, that we structure five distinct opportunities to “get it right.” To ensure recommendations become reality we:

- **Involve key department leaders in the discussion of findings and recommendations during the research phase of the review.** We want to, not only collect information, but also ensure the “buy-in” of key managers and staff so that they have ownership of the issue and recommendations when formulated.
- **Conduct a formal “tollgate” that provides the opportunity for the department head and other key state leaders to question findings and recommendations, and fully vet the results.** Findings and recommendations must not only be understood, but also fully supported by state leadership in order to ensure success. Most times, department heads cannot do it alone – everyone needs to be on board to agree to the needed change and to implement it.
- **Meet with department heads once recommendations are finalized to provide another opportunity for them to understand what is being recommended.** This provides department leadership with an opportunity to refine information for the final recommendation and to begin to formulate plans for implementation.
- **Establish a “contract” between the Governor’s Office and the department head as the commitment to implement the recommendations.** As we learned in West Virginia and have used ever since, putting the expected change in operations, desired outcome, and timeframe for implementation in writing removes any ambiguity about what is to happen and who is responsible. This level of commitment in writing has proven to be a useful tool to keep the focus on critical activities and milestones.
- **Assist departments as needed after the performance review is complete in order to ensure recommendations are implemented.** As was the case in West Virginia, we are often called upon to assist with the implementation of recommendations. We have gone beyond the initial steps developed for the implementation plan and developed outcomes measures, tracking systems and additional detailed process mapping. Most importantly, we have been engaged to bring together multiple agencies charged with implementing cross-departmental recommendations to assist them in focusing on required outcomes.

Task 6: Submit Draft Report for Input

At this stage, background information, findings, recommendations, fiscal analysis and methodology and implementation sections – complete with both text and tables – are put



into draft form for eventual publication. The report is written to be persuasive, objective and clear – using meaningful terminology yet free of jargon – so that the public can understand the issue and recommendation. Reports also include sufficient implementation information for managers and staff to use it as a blueprint for making the changes suggested.

We will:

- Work with the Project Manager to decide the format for the draft and final reports.
- Develop fiscal impact estimates for recommendations that specify, as appropriate, impacts including the impact on individual departments and functions, staff, students, families and the budget overall.
- Develop preliminary implementation tables that include timelines, priority actions to be taken and anticipated results. In addition, the implementation section of each issue paper will include identified impediments to successful implementation and proposed solutions to mitigate these issues.
- Draft the full report for initial review by the Project Manager and district leadership.

Task 7: Incorporate Input and Submit Final Report

Draft written reports are developed and submitted with sufficient time for input from as wide an audience as requested by the Project Manager. Since the report becomes the permanent record of the review and analysis, it is written not only for immediate use, but also as a guide for the organization and a tool for follow-up to determine if recommendations are being fully implemented.

Reports go through a rigorous review and editing process before public distribution. **Public Works** and **MGT** also work with the Project Manager to develop briefings and presentations for key stakeholders as needed.

Performance Review reports eventually become public documents used to enhance citizen awareness of the issues and recommendations and to help decision makers view the issues analytically and understand what may be required to implement recommendations. The process for writing and disseminating the report requires attention and planning. Reports go through several iterations and reviews before they are ready for publication.

A well-written report is persuasive and clear and presents issues and recommendations in an objective manner that can be easily followed by any reader. In order to accomplish these objectives, we ensure reports are written:

- Using simple and direct language, as free from jargon and acronyms as possible;



- Recognizing that the audience may be people who are not familiar with the issue and the report needs to persuade them that the recommendations will improve the situation being addressed;
- Using a more informal style and tone than those typical of a formal audit; and
- Presenting issues as risks and opportunities, not as shortcomings of the agency or staff.

The typical Performance Review report presents information on each of the recommendations developed during the course of the review. Each recommendation is presented in about two to four pages of text and tables and is designed for a wide audience, including citizens. This concise format not only focuses the presentation on the relevant information, it also lends itself to a simple format that can more easily keep a reader's attention. For government managers and others who want more detailed information or background, the facts and assertions in the report are well documented with either footnotes or endnotes.

Task 8: Advising on Policy Issues

Policy advising requires a skillful combination of interpersonal, trusted advisor relationships and completion of work products that meet client needs and expectations. Unlike projects that specify an approach to work and have defined deliverables and timeframes, our policy office engagements are often more open-ended and fluid. Policy responses must be flexible and timely to address such dynamics as changes in legislation, technology, finance, federal programs and regulations, and state political climates.

We pursue several key objectives in working with Governor's Offices on policy:

- Getting beyond the crises typical of Governor's Office operations. As advisors rather than part of the management team that must deal with day-to-day crises, our role is to stay focused on the broader agenda for the administration so as to keep policy and planning moving ahead while crises are being addressed.
- Establishing and maintaining cross-agency planning and communication.
- Bringing new initiatives to the Governor and policy decision-makers.
- Identifying best practices from around the country that may benefit the state.
- Brokering information between the Governor's Office and one or more agencies.
- Addressing specific requests to support initiatives that arise.



3.2. Timeline

The following timeline outlines the estimated level of effort and timeframe for completing the tasks described above. It should be noted that the timeframe outlined in the EOI Q&As will require a very aggressive schedule even with the negotiation of a scope of work that will include some combination of state-level, RESA and local district reviews. Typically, reviews of this type (with multiple levels of operations and on-site work that requires traveling to all geographic parts of the state) take at least one year to complete; West Virginia has outlined possibly less than a four-month schedule. We expect, therefore, that the first discussions will be to adjust this timeline as needed to meet the requirements for a scope that can realistically fit within the established time constraints.

Task Name	Duration	Start	Finish
Task 1: Project Launch Meeting	4 days	Mon 10/4/10	Thu 10/7/10
Review initial work plan	1 day	Mon 10/4/10	Mon 10/4/10
Review possible operations for performance audit: state, regional, local	1 day	Mon 10/4/10	Mon 10/4/10
Make final decisions on scope	1 day	Mon 10/4/10	Mon 10/4/10
Select sample of regional and local districts to be reviewed	1 day	Mon 10/4/10	Mon 10/4/10
Notify departments, RESAs, local districts of review	2 days	Wed 10/6/10	Thu 10/7/10
Establish communications plan, dates for future meetings/conferences	1 day	Mon 10/4/10	Mon 10/4/10
Task 2: Review Data, Reports, Background Information	29 days	Tue 10/5/10	Fri 11/12/10
Develop data/document requests	1 day	Wed 10/6/10	Wed 10/6/10
Disseminate requests to departments, RESAs, local districts	1 day	Thu 10/7/10	Thu 10/7/10
Review data and other available information	19 days	Tue 10/5/10	Fri 10/29/10
Prepare brief summary of information	10 days	Mon 11/1/10	Fri 11/12/10
Follow-up request for additional data, if needed	6 days	Fri 10/15/10	Fri 10/22/10
Isolate areas of importance for review, benchmarking, best practices	19 days	Tue 10/5/10	Fri 10/29/10

2011

2010

31-Jan

23-Jan

16-Jan

9-Jan

2-Jan

26-Dec

19-Dec

12-Dec

5-Dec

28-Nov

21-Nov

14-Nov

7-Nov

31-Oct

24-Oct

17-Oct

10-Oct

3-Oct

Task Name	Duration	Start	Finish
Task 3: Conduct Benchmarking and Best Practices Research	22 days	Fri 10/15/10	Mon 11/15/10
Identify appropriate national and professional benchmarks	11 days	Fri 10/15/10	Fri 10/29/10
Assess the applicability of practices to WV	3 days	Wed 10/27/10	Fri 10/29/10
Develop preliminary findings based on benchmarking, best practices, cost-benefit analysis	11 days	Mon 11/1/10	Mon 11/15/10
Task 4: Conduct On-Site Research and Assessments	23 days	Mon 10/4/10	Wed 11/3/10
Identify stakeholders, managers, staff, others to be interviewed	4 days	Mon 10/4/10	Thu 10/7/10
Arrange interview schedule: one-on-one, small group, focus groups	3 days	Thu 10/7/10	Mon 10/11/10
Conduct interviews on-site for each department, RESA or local district that is subject to the review	12 days	Wed 10/13/10	Thu 10/28/10
Compile information and data from interviews for analysis	16 days	Wed 10/13/10	Wed 11/3/10
Task 5: Prepare Preliminary Findings, Recommendations and Implementation Plans	16 days	Mon 10/25/10	Mon 11/15/10
Prepare initial issues docket	8 days	Mon 10/25/10	Wed 11/3/10
Conduct Tollgate session to review issues docket and decide which issues go forward	3 day	Tue 11/9/10	Tue 11/11/10
Conduct additional research if needed	5 days	Tue 11/9/10	Mon 11/15/10

2011

2010

31-Jan
23-Jan
16-Jan
9-Jan
2-Jan
26-Dec
19-Dec
12-Dec
5-Dec
28-Nov
21-Nov
14-Nov
7-Nov
31-Oct
24-Oct
17-Oct
10-Oct
3-Oct



Task Name	Duration	Start	Finish
Task 6: Submit Draft Report	25 days	Thu 12/2/10	Wed 1/5/11
Produce outline of report for review and comment	5 days	Thu 12/2/10	Wed 12/8/10
Write first draft of final report	16 days	Wed 12/8/10	Wed 12/29/10
Submit draft for review and comment	1 day	Fri 12/31/10	Fri 12/31/10
Meet with Governor's Office and/or other education leaders to review report	1 day	Wed 1/5/11	Wed 1/5/11
Task 7: Submit Final Report	18 days	Thu 1/6/11	Mon 1/31/11
Incorporate comments and revise final report as needed	9 days	Thu 1/6/11	Tue 1/18/11
Submit final report	1 day	Mon 1/31/11	Mon 1/31/11

2011

2010

31-Jan
23-Jan
16-Jan
9-Jan
2-Jan
26-Dec
19-Dec
12-Dec
5-Dec
28-Nov
21-Nov
14-Nov
7-Nov
31-Oct
24-Oct
17-Oct
10-Oct
3-Oct

3.3. Project Management

The result of a review such as that envisioned by the State of West Virginia means change – it could mean change in how employees do their work every day, change in resource availability, change in oversight of work, change in responsibility, change in what staff see as their primary objectives. We are very aware of the challenges that change presents and manage reviews such as this to address the issues that are invariably present. We establish an internal management structure that identifies and addresses project-related issues as they arise, not waiting for them to escalate. Our fundamental project management approach includes:

- **Identification of a Corporate Officer-in-Charge** to ensure that all needed corporate resources are available to manage the project and for successful completion of the project to the client's expectations.
- **Assignment of a Public Works Project Manager** who is responsible for all phases of the planning and implementation of the project. Identifying a single point of contact ensures the state has clear lines of communication on project planning, status, and quick resolution of issues if any arise. The Public Works Project Manager is responsible for ensuring project completion to the satisfaction of the state. The Project Manager will be on-site regularly and available to the State Project Manager and State team on a daily basis.
- **Formation of Public Works and MGT project teams with a wide range of experience** that have the knowledge and experience of how government works at all levels, the ability to analyze policies and operations and to develop realistic recommendations for improvement. We schedule team members to be on-site as needed to ensure work is progressing, information is collected and analyzed, and sufficient opportunity is provided for interaction and discussion of findings and recommendations. We have found that face-to-face time with key stakeholders and management enhances the quality of the product produced, as well as the chances for successful implementation.
- **Close collaboration with the State Project Manager** to coordinate requirements on the State side. We consider the appointment of a State Project Manager to be a critical factor in ensuring that planning is refined, implementation is on schedule and on target, and logistics are handled efficiently. The Public Works Project Manager is in close and frequent contact with the State Project Manager to ensure the project is meeting state needs.
- **Timely project initiation and communication** to ensure a clear understanding of project requirements. Public Works and MGT devotes considerable time and effort to initial project start up, including review and adjustment to the proposed work plan as needed. We have found these efforts provide the best opportunity for success in the entire project. Once a scope is determined as outlined in the



EIO, we hold a project kick-off meeting with the Public Works and MGT team and the State in order to introduce members, discuss initial planning steps and determine points of contact and the most productive means for on-going communication. In addition, monthly reports are prepared to provide the status of activities, schedule next steps, identify issues that may arise and propose solutions.

- **Flexibility in approach to ensure that State requirements are met throughout the project.** Through constant communication and periodic reports, Public Works, MGT and the State Project Manager are always aware of the status of work and can make adjustments as needed to address the realities of implementation. Remaining flexible in our approach gives us the ability to adjust activities and tasks as needed.



4. REQUIRED FORMS



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

Public Works LLC
 1690 E. Strasburg Rd.
 West Chester, PA 19380

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
0001	1	JB		946-30		
EXPRESSION OF INTEREST						
EDUCATION AUDITING						
EXPRESSION OF INTEREST						
<p>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.</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, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE 	TELEPHONE 610-296-9443	DATE September 22, 2010
TITLE President	FEIN 03-0447140	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 41 804-558-0492

VENDOR

RFQ COPY
 TYPE NAME/ADDRESS HERE
Public Works LLC
 1690 E. Strasburg Rd.
 West Chester, PA 19380

SHIP TO

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

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<p>***** THIS IS THE END OF RFQ GOV20110 ***** TOTAL:</p> <p>Per EOI instructions, No "price" or "fee" quotation is requested or permitted in the response.</p>						

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SIGNATURE 	TELEPHONE 610-296-9443	DATE September 22, 2010
TITLE President	FAX 03-0447140	ADDRESS CHANGES TO BE NOTED ABOVE

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BUYER 41 304-558-0492

VENDOR	RFQ COPY
	TYPE NAME/ADDRESS HERE
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	1690 E. Strasburg Rd. West Chester, PA 19380

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

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
09/09/2010				

BID OPENING DATE:	09/23/2010	BID OPENING TIME	01:30PM
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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
				ADDENDUM NO. 1		
				1. QUESTIONS AND ANSWERS ARE ATTACHED. 2. ADDENDUM ACKNOWLEDGMENT IS ATTACHED. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN DISQUALIFICATION OF YOUR BID. EXHIBIT 10		
				REQUISITION NO.: GOV20110		
				ADDENDUM ACKNOWLEDGEMENT		
				I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.		
				ADDENDUM NO. S:		
				NO. 1 <input checked="" type="checkbox"/> Questions and Answers		
				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.		
				VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES		

SEE REVERSE SIDE FOR TERMS AND CONDITIONS			
SIGNATURE	TELEPHONE	DATE	
	610-296-9443	September 22, 2010	
TITLE	F.E.N.	ADDRESS CHANGES TO BE NOTED ABOVE	
President	03-0447140		

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PROPERTY

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LINE	QUANTITY	UCP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.</p> <p>..... SIGNATURE</p> <p>Public Works LLC COMPANY</p> <p>September 22, 2010 DATE</p> <p>NOTE: THIS ADDENDUM ACKNOWLEDGEMENT SHOULD BE SUBMITTED WITH THE BID.</p> <p>REV. 09/21/2009</p>						

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SIGNATURE	TELEPHONE	DATE
	610-296-9443	September 22, 2010
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
President	03-0447140	

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EDUCATION AUDITING						
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Per EOI instructions: "No 'price' or 'fee' quotation is requested or permitted in the response."						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS		
SIGNATURE 	TELEPHONE 610-296-9443	DATE September 22, 2010
TITLE President	FEIN 03-0447140	ADDRESS CHANGES TO BE NOTED ABOVE

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STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

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 owed 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.

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.

WITNESS THE FOLLOWING SIGNATURE

Vendor's Name: Public Works LLC
Authorized Signature: [Signature] Date: 09/10/10
State of PA WV

County of Chester, to-wit:

Taken, subscribed, and sworn to before me this 10th day of September, 2010.

My Commission expires July 27, 2013.

AFFIX SEAL HERE

NOTARY PUBLIC [Signature]

