

West Virginia Department of Health and Human Resources
Bureau for Behavioral Health and Health Facilities
Response to Request for Quotation:

BHS12006

by

Barnett Ink
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Introduction

Company Overview

Barnett Ink is a Huntington, West Virginia company with extensive experience in program evaluation and grant evaluation. Barnett Ink provides both process and outcome evaluation services. Barnett Ink has successfully conducted evaluations for eleven SAMHSA grant programs including substance abuse and mental health treatment grants for women and for homeless persons, a drug free communities grant, and a youth violence prevention grant. They are currently evaluating a Dept. of Justice Weed and Seed grant and to mental health centers for a supportive housing/mental health treatment for the chronically homeless. In 2008 – 2009, they completed evaluations of SAMHSA grants for adolescent drug treatment, for a Youthful Offenders Re-entry program in seven counties, and a FEMA/SAMHSA Crisis Counseling grant. They have also been evaluators for a Twenty-First Century Dept. of Education grant, grants from the Small Business Administration and from HUD for Enterprise Community and Empowerment Zone grants.

Barnett Ink uses a collaborative approach to evaluation and is experienced in working with community groups and consumers. The evaluators involve program staff and stakeholders in planning and implementing evaluation activities in order to build local capacity to conduct sound evaluations. They also strive to make the evaluation meaningful and useful to the project by providing frequent feedback in an understandable and usable format. Barnett Ink has been recognized nationally for their approach to evaluation and the principle evaluators have been invited presenters on “Using Evaluation for Program Improvement,” “Making Evaluations Useful,” and “Using Evaluation for Sustainability” at national SAMHSA-CSAT conferences for grantees.

Barnett Ink is currently evaluating five projects. We are evaluating the highly successful Weed & Seed program for the City of Huntington, SHAPE a homeless program for Huntington and Charleston, and two school counseling programs for the Lincoln County Schools.

Barnett Ink WWSBIRT Evaluation- During the past three years, Barnett Ink has been the evaluators for the WWSBIRT Program. We were with WWSBIRT from the beginning of the grant process. Barnett Ink staff advised the BHHF grant writing team on ways to present the goals and objectives in terms that could be quantifiable and measurable. Barnett Ink also provided the evaluation plan which was included in the grant document and was named in the proposal as the independent evaluators. The evaluation section of the grant application received the maximum of 15 points. C. Robert Barnett, PhD has been approved by SAMSHA as the project evaluator and is the evaluator of record.

Barnett Ink has had a full staff available for the evaluation from the beginning of the project on October 1, 2008. We worked with the BHHF staff to provide the initial grant orientation for the Behavioral Health Centers and the state of WV Primary care staff. Barnett Ink also worked with the BHHF interim clinical director to develop the implementation plan.

During Year 1 of the grant, Barnett Ink provided a process evaluation of project implementation with quarterly reports of the status of planned start-up activities and a comprehensive annual report of the implementation process. Beginning in Year 2 of the grant, Barnett Ink has provided weekly reports and quarterly statistical summaries of key performance indicators measuring whether WWSBIRT is on track to achieve its goals and objectives. These weekly reports include number of patients screened, number of positive screens and number treated at each screening site and partner agency. In addition, Barnett Ink has provided comprehensive semi-annual reports and annual reports for the first 2 ½ years of the project. The semi-annual and annual reports have included a description of screening sites and staffing, analysis of services provided and fidelity to models and the grant plan, client census, profile of clients, changes in clients' substance use and other key results of follow-up interviews, summaries of progress on reaching the projects goals and objectives, conclusions and recommendations for the project. Barnett Ink's extensive program for locating clients and obtaining follow-up interviews has been very successful and in the first 2 ¾ years of the project. Barnett Ink has interviewed 95% of the clients eligible for follow-up interviews which is more than the 80% completion rate required by CSAT and far above the national average of 65% for all SBIRT grants.

The Evaluation Coordinator has kept the complete records for the project and has provided numerous pieces of information to the project partners that have been used for quality control. She has also trained every WWSBIRT staff member on how to use the GPRA forms to report data as well as how to score the ASSIST. In addition the Barnett Ink staff helped the clinical director with process mapping of individual clinics. Barnett Ink has also voluntarily provided short term help with manual data entry because of the delay in putting a computer data system in place.

Barnett Ink has successfully provided the evaluation for the first 2 ¾ years of the WWSBIRT project. We look forward to working with WWSBIRT through the final two years to a successful completion of the project.

The Barnett Ink WWSBIRT Team

Barnett Ink currently has 13 persons working on the WWSBIRT project. The members of the WWSBIRT evaluation team are:

C. Robert Barnett, PhD, Evaluation Director. Dr. Barnett is the CEO for Barnett Ink and directs the company. He is the former Director of Grants and Research Development for Marshall University and former professor in the Division of Exercise Science, Sport, and Recreation. He provides fiscal oversight, works on report conceptualization and writes and provides overall evaluation strategy for the WWSBIRT Project.

Lysbeth Barnett, MBA, Co-evaluation Director. A former management professor, provides evaluation planning, designs and writes reports, has worked with the data system design and has provided data for both the Sustainability and Steering committee. She has also been the lead person in the site process mapping.

Dorothy Jean Budrus, MA, Evaluation Coordinator. Responsible for the day-to-day evaluation of the project. She provides training on data collection for all WWSBIRT staff, makes site visits, assists with the report writing, and provides weekly updates on the status of the project including the productivity of each site. In addition, she supervises the follow-up interview process and the data entry staff.

William H. Barnett, JD, Statistician-Analyst. Provides expertise in legal issues. He is the lead statistician providing analysis for all quarterly, semi-annual and annual reports.

James Atkinson, BA, Database Manager. Maintains the local databases for tracking clients in the follow-up pool and local evaluation. He assists in preparing weekly reports of intakes and services and in verifying data validity.

Belinda Clark, BA, The Follow-up Coordinator. Coordinates payment of incentives, verifies follow-up interviews have been entered on the CSAT web-site, prepares payments to each client completing a follow-up interview and/or sees that supporting documentation of payment of incentives to clients has been received.

Malinda Morrello, Interview Quality Control. Assists with the GPRA interviews by checking for data entry mistakes and monitors duplicate pre-screens. She also has helped coordinate the data entry and assisted with data management.

Two Tracker-Interviewers. These staff members find and conduct 6-month follow-up interviews with clients who are difficult to find or contact.

Four Data Entry Staff. These staff members have provided the data entry for the WWSBIRT project.

PART 3 PROCUREMENT SPECIFICATIONS

3.1 General Requirements

RFQ Requirement: The successful bidder must provide independent evaluation of overall grant operation as it relates to completion of grant goals, objectives and movement toward sustainability over the five year period of SAMHSA/CSAT funding. This will include evaluation of data collection elements that will be used to evaluate said goals and objectives.

Response: Barnett Ink will provide independent evaluation of the overall grant operation as it relates to completion of grant goals, objectives and movement toward sustainability over the five year period of the SAMHSA/CSAT funding. This will include evaluation of data collection elements that will be used to evaluate the goals and objectives. The following requirements have been met as follows:

RFQ Requirement: The following are required to be a successful bidder for these services:

3.1.1. One (1) year of previous experience in providing evaluation services for SAMHSA /CSAT SBIRT grant(s).

Response: Barnett Ink has 2-1/2 years of experience providing evaluation services for a SAMHSA/CSAT/SBIRT grant. Barnett Ink has provided evaluation services to the SAMHSA/CSAT/SBIRT grant: WWSBIRT, grant #TI019535 for the grant Year 1 from 10-1-2008 to 9-30-2009, grant Year 2 from 10-1-2009 to 9-30-2010 and grant Year 3 from 10-1-2010 to the present.

RFQ Requirement:

3.1.2. At least eight (8) hours of documented training in the Government Results Reporting Act (GPRA).

Response:

D. Jean Budrus, Evaluation Coordinator: (22 hours)

- GPRA Training of Trainers (Certificate of Attendance in Attachment 1) GPRA training by Amy Romero and Christopher Craft, New York, NY, 4-14/4-15, 2010 (14 hours).
- GPRA Advanced Follow-up Training, Webinar 2-6-2009 (2 hours)
- GPRA Follow-up Training TA, Marti Wilson, Wilson Associates, 3-31-06 (6 hours)

Lysbeth Barnett, Evaluation Co-Director: (22 hours)

- "GPRA 101", Robert Atanda and Anton Benton, Targeted Capacity Expansion Grantee Meeting, Washington DC, 7-29-03 (4 hours)

- “GPRA” by Deepa Avula and Donna Atkinson at SAMHSA/CSAT - YORP/TCE Orientation and Training Workshop, Washington DC, 12-6-04 (1 hour)
- “GAIN and coordination with GRPA” SAMHSA/CSAT - YORP/TCE Orientation and Training Workshop, Washington DC, 12-7-04 (2 hours)
- “Comparing the Results Obtained from the Paper GPRA Tool to the GAIN-I using ABS” Joint Meeting of SAMHSA-CSAT, NIH-NIDA-NIAAA,SASATE on Adolescent Treatment Effectiveness, Washington DC, 3-22-2005 (1 hour)
- Revised GPRA and Data Entry on New SAIS Website- SAMHSA/CSAT TA Washington DC 5-05 (4 Hours)
- GPRA and Local Evaluation, Deepa Avula, SAMHSA/ CSAT/Criminal Justice YORP Grantee Workshop 1-9-06 Bethesda MD (1 hour)
- Important Nuances between GPRA reports/data and FUL reports, Michael Dennis and Michelle White, SAMHSA CSAT Criminal Justice YORP Grantee Workshop 1-10-06 Bethesda MD (1 hour)
- GPRA Follow-up Training TA, Marti Wilson, Wilson Associates, 3-31-06,(6 hours)

Malinda Morrello, Interview Quality Control (2 hours)

- CSAT GPRA Data Entry Training. Webex Training 4-19-2010 (2 hours)

RFQ Requirement:

3.1.3. At least forty (40) hours of experience in training others in data implementation using GPRA.

Response:

D. Jean Budrus, Evaluation Coordinator: (278 hours)

- WWSBIRT Grant Staff Training for interviewing and collecting GPRA data
 - FMRS Staff Training - 5-14-2009 (6 hours)
 - Westbrook Staff Training - 6-2-2009 (6 hours)
 - Prestera Staff Training 6-8-2009 (6 hours)
 - Prestera Staff Training 6-15-2009 (6 hours)
 - Westbrook and Valley Health Care Staff Training - 7-13-2009 (6 hours)
 - Prestera Staff Training 7-27-2009 (6 hours)
 - Prestera Staff Training 7-30-2009 (6 hours)
 - Valley Health Care Staff Training - 8-10-2009 (6 hours)
 - Valley Health Care Staff Training - 9-15-2009 (6 hours)
 - Westbrook Staff Training 10-20-2009 (6 hours)
 - Westbrook Staff Training 12-11-2009 (6 hours)
 - FMRS Staff Training - 12-16-2009 (6 hours)
 - Valley Health Care Staff Training - 1-15-2010 (6 hours)
 - Westbrook Staff Training 1-18-2010 (6 hours)
 - Prestera Staff Training 1-22-2010 (6 hours)
 - WVU Behavioral Medicine Staff Training 2-8-2010 (6 hours)
 - Prestera Center CAMC Staff Training 2-18-2010 (6 hours)

- Westbrook Staff Training 2-23-2010 (6 hours)
- FMRS Staff Training 3-4-2010 (6 hours)
- Prestera School Based Staff Training 3-10-2010 (6 hours)
- Prestera School Based Staff Training 4-5-2010 (6 hours)
- WVU Behavioral Medicine Staff Training - 4-20-2010 (6 hours)
- Prestera Staff Training - 5-5-2010 (6 hours)
- Valley Health Care Staff Training 5-6-2010 (6 hours)
- Prestera Center Cabin Creek Staff Training 6-1-2010 (6 hours)
- Westbrook Staff Training 6-8-2010 (6 hours)
- West Virginia Health Right Staff Training 6-14-2010 (6 hours)
- Prestera Center Staff Training - 6-15-2010 (6 hours)
- Prestera Center Cabin Creek Staff Training - 6-16-2010 (6 hours)
- FMRS Staff Training 6-22-2010 (6 hours)
- Prestera Center Staff Training 7-9-2010 (6 hours)
- Westbrook Staff Training 8-2-2010 (6 hours)
- FMRS Staff Training 8-6-2010 (6 hours)
- Valley Health Care Staff Training - 8-9-2010 (6 hours)
- Prestera Staff Training 8-31-2010 (6 hours)
- Westbrook Staff Training 10-11/10-12-2010 (10 hours)
- Prestera Center Staff Training 10-14/10-15-2010 (10 hours)
- Prestera Center Staff Training 11-19-2010 (6 hours)
- Prestera Center Cabin Creek Staff Training - 12-20-2010 (6 hours)
- Prestera Center Staff Training - 3-4-2011 (6 hours)
- Valley Health Care Staff Training 3-23/24-2011 (10 hours)
- FMRS Staff Training 4-21-2011 (6 hours)
- Westbrook Staff Training 5-31-2011 (6 hours)
- Prestera Staff Training 6-2-2011 (2 hours)
- FMRS Staff Training 7-11-2011 (6 hours)

Lysbeth Barnett Evaluation Co-Director: 74 hours training provided

- Engagement, Rehabilitation, Aftercare (ERA): A SAMHSA/CSAT Treatment for the Homeless Grant, 6/1/2003 to 11/30/2006 – 63 hours training
 - ERA staff training on paper GPRA 3 – 2 hour individual trainings and 2 - 4 hour group trainings from 11-1-03 to 1-31-04 Total 14 hours
 - Data Entry staff training on entering data in the CSAT on-line form 4-04 3 hours
 - ERA Staff training on computer-based GPRA and supporting records 6-1-04 to 5-31-05: 6 – 2 hour group trainings and 20 – 1 hour individual trainings Total – 32 hours
 - 3-25-2004 GPRA training for Staff, Supervisors, Partner Agencies and Steering Committee 3 hours
 - Group Training on revised GPRA Tool 2 – 4 hour group training in 7 and 8-05 Total 8 hours

- New staff training 2-06 - 3 hours
- Re-entering Our Communities Successfully (ROCS) a DOJ- SAMHSA/CSAT Youthful Offenders Re-entry Program (YORP) Grant 10/1/04 to 9/30/09 - 11 hours Training
 - Train Program Coordinator 12-8-04, 2 hours
 - Train Therapist 2-05, 2 hours
 - New Interviewer and Revised GPRA Training 7-05, 4 hours
 - New staff training 2-06, 3 hours

RFQ Requirement:

3.1.4. Provide documentation of at least eighty (80) percent compliance rate on follow-up with a previous SAMHSA/CSAT grant.

Response: Barnett Ink had a 100% compliance rate of completions for 6-month follow-up interviews for Substance Treatment Available for Rural Students (STARS) (TI-17728) a SAMHSA/CSAT Assertive Adolescent and Family Treatment (AAFT) Grant for follow-up interviews conducted during the grant from 10/1/06 to 6/30/10.

Barnett Ink had an 88.4% compliance rate of completions for 6-month follow-up interviews for the Re-entering Our Communities Successfully (ROCS) (TI-17046) a SAMHSA/CSAT Youthful Offenders Re-entry Program (YORP) Grant, for follow-up interviews conducted during the grant from 10/1/04 to 9/30/09.

A letter from the agency which conducted these projects documenting these results is located in Attachment 2.

3.2 Scope of Work:

3.2.1 The Successful bidder will produce required reports within the specified timeframes as follows:

RFQ Requirement:

1) Vendor will provide 1st Quarterly SAMHSA Report - October 1 to December 31- Due January 30th

Response: 1) Barnett Ink will provide 1st Quarterly SAMHSA Report - October 1 to December 31 - by January 30th

RFQ Requirement:

2) Vendor will provide Semi Annual SAMHSA Report - October 1 to March 31- Due April 30th

Response: 2) Barnett Ink will provide Semi Annual SAMHSA Report - October 1 to March 31 - by April 30th

RFQ Requirement:

3) Vendor will provide 3rd Quarterly SAMHSA Report - April 1 to June 30 - Due July 30th

Response: 3) Barnett Ink will provide 3rd Quarterly SAMHSA Report - April 1 to June 30 - by July 30th

RFQ Requirement:

4) Vendor will provide Annual Evaluation SAMHSA Report - October 1 to September 30 - Due October 30th

Response: 4) Barnett Ink will provide Annual Evaluation SAMHSA Report - October 1 to September 30 - by October 30th

RFQ Requirement:

5) Vendor will provide monthly reports to the Policy Steering Committee on Completion of Grant Goals/Objectives

Response: 5) Barnett Ink will provide monthly reports to the Policy Steering Committee on Completion of Grant Goals/Objectives

RFQ Requirement:

6) Vendor will provide weekly reports to the BHHF to be submitted during weekly meetings

Response: 6) Barnett Ink will provide weekly reports to the BHHF to be submitted during weekly meetings

RFQ Requirement:

7) Vendor will provide Bi-Monthly Clinic "Snapshots" to provide feedback to field site for improvement of the SBIRT Process

Response: 7) Barnett Ink will provide Bi-Monthly Clinic "Snapshots" to provide feedback to field site for improvement of the SBIRT Process.

RFQ Requirement:

The general format of each semi-annual report and policy steering committee report is as follows, however, the format of the report is based on the discretion of the evaluation team related to overcoming barriers to sustainability or completion of the grant goals and objectives:

- I. West Virginia Project Overview/History**
- II. Review of Relevant Achievements in Relation to the Project Goals/Objectives**
- III. Highlights of Major WWSBIRT Activities and Events**

IV. Relevant Project Data

V. Conclusion/Recommendations

In each semi-annual report, the vendor must also provide data about the costs for the delivery of screening and brief intervention, including the mean, median, and range of costs overall, by facility type, and region and sub-recipient, if applicable. The vendor must also discuss how such costs compare to the CSAT approved cost parameters for screening and brief intervention and what efforts they are undertaking to bring costs into line with those expected.

Weekly reports will specify the number of screenings by site, # of those screening positive and negative by site, numbers of expected screenings to be collected by site, the gap between those available for screening and those actually screened by site, number of interventions by site, specifically brief interventions, brief treatment and referrals to treatment. The successful bidder will provide reports that will be used by SBIRT contracted sites that will identify performance or "buy-in" in meeting the specified demands of the grant. These reports will be sent via email.

All reports will be sent to the BHHF for review. The BHHF will forward the reports to the West Virginia Governors office and other stakeholders. There will be 15 copies allotted for distribution to additional stakeholders and the reports are approximately 20-30 pages in length and will be delivered by mail.

The clinic "snapshots" will be used to communicate to sites where they are in relation to completion of screening/intervention targets. The clinic "snapshots" will be done bimonthly and will include available screenings, completed screenings and relationship to all site targets. This information will be presented in a graphic representation that will easily communicate said information.

Response: Barnett Ink has been nationally recognized for the quality of reports it provides to projects and has been invited by SAMHSA/CSAT to make presentations to other evaluators at CSAT national grantee conferences on the topics of "Using Evaluation for Program Improvement," "Making Evaluations Useful," and "Using Evaluation for Sustainability." Barnett Ink will provide reports which are designed to provide timely, understandable, and useful information to the project.

The Semi-Annual and Annual reports will provide a chronological process evaluation which will include an overview of the scope and goals and objectives and history of the project, recent achievements and major project activities from the period covered by the report, progress on each of the project's goals and objectives. In addition, outcome evaluation findings will include a profile of clients at intake, screening and treatment services provided, services provided by the project and change data in client substance use and other relevant factors from the follow-up and discharge interviews as well as conclusions and recommendations. Cost data supplied by the project on the budgeted amounts and expenditures by site, partner agency and project will be analyzed to determine the mean, median and range of costs for grant services (including direct

and administrative costs) by site, modality, type of site, and sub-recipient if applicable and will be included in the semi-annual and annual report when expenditure data has been supplied by the project. Reports to the Policy Steering Committee will summarize these findings and interim data, the project's progress on meeting its goals and objectives and other data as needed for subjects under discussion by the committee.

Weekly reports will be emailed to the project. These reports will consist of screenings and interventions by site that include cumulative and current figures for: expected number of screen to be done by site compared to actual number collected, number and % of positive screenings, number and % of interventions total and by modality (BI,BT,RT) with aggregate figures for each partner agency and for WWSBIRT.

Reports in electronic and 15 print copies (15 for semi-annual and annual reports with additional copies provided for the Steering Committee Reports based on membership) will be sent to BHHF for review and distribution.

Clinic snapshots which present a graph of screens collected by month over time and rate of positive screens and rate of interventions/treatment provided to clients screening positive will be emailed bi-monthly to the WWSBIRT PI and Clinical Director at BHHF and to partner agencies.

RFQ Requirement:

3.2.2 The successful bidder will provide training for SBIRT field staff on implementation and submission using the GPRA instrument. This is generally a 6-8 hour training using the SAMHSA GPRA manual and includes proper use of prescreening instruments, the "Alcohol, Smoking and Substance Involvement Screening Test", hereafter known as the "ASSIST" and the Physical Health Questionnaire, hereafter known as the "PHQ-9" and accurate completion of the GPRA instrument in accordance with the "GPRA Question by Question" document. The bidder will maintain a list of trained staff with contact information and will provide assistance or retraining with those having difficulty with GPRA implementation in the specified format that will satisfy upload to the CSAT Services Accountability Improvement System, hereafter known as the "SAIS". The bidder will maintain a log of those trained and keep the BHHF informed of training times, locations, recipients and results of the training. The vendor will be available by phone, email or other means to consult with SBIRT field staff on the accurate collection of prescreening instruments, GPRA instruments and follow up forms. The vendor must plan 35 visits annually to complete the training/re-training outlined above.

Response: Barnett Ink is very experienced with using the GPRA as they were among the original cohort to use it (in 1998) and they continue to successfully employ it in its current format. As such, Barnett Ink has extensive experience in providing GPRA training and will continue to employ this training and re-training experience for SBIRT field staff on implementation and submission of data using the GPRA instrument. This is generally a 6-8 hour training on how to accurately complete the GPRA instrument using GPRA training techniques supported by the SAMHSA GPRA Question by Question Guide. The training includes the proper scoring and

reporting of prescreening instruments, the "Alcohol, Smoking and Substance Involvement Screening Test" (ASSIST), and the Physical Health Questionnaire (PHQ9).

Barnett Ink will provide assistance or retraining for those having difficulty with GPRA implementation or GPRA data collection so that data collected meets the upload specifications of the Services Accountability Improvement System (SAIS) website.

Barnett Ink will maintain a log of trained staff, including names and contact information, training times and locations. Barnett Ink will track the number of WWSBIRT staff completing the training and provide a list of staff trained to BHHF.

Members of the Barnett Ink evaluation team will be available by phone, email or other means to consult with the WWSBIRT field staff on the accurate collection of pre-screening instruments, GPRA instruments and follow-up forms. Barnett Ink will plan up to 35 visits annually to complete the training/re-training of WWSBIRT staff as required.

RFQ Requirement:

3.2.3 The successful bidder will conduct quarterly site visits to perform quality assurance activities and to validate the information being reported and to access barriers to implementation of the SBIRT process in each clinic. This will entail a development of a systematic evaluation process and forms. This will also include interviews with site staff to access barriers and to give feedback on site performance. This may be done in conjunction with the SBIRT Clinical Director and/or the SBIRT staff supervisor or representative.

Response: Barnett Ink will make quarterly site visits to screening sites to observe the site's operations and to assess its screening/service delivery process. The evaluators will develop a structured interview form and checklist for quality assurance and to ensure systematic evaluation occurs across sites.

RFQ Requirement:

3.2.4 The successful bidder will conduct an annual process evaluation that will be included as part of their annual report that will clearly outline the project's performance. As part of this process, the successful bidder will develop an "encounter" form that will be used to track the SBIRT process at each site, including the number of patients receiving the prescreening and screening using the ASSIST and PHQ-9.

Response: Barnett Ink will provide a process evaluation of WWSBIRT's performance as part of its comprehensive annual report. The process evaluation will include a description of the contributions of each partner agency to project performance including number and type of screening sites, staffing, services provided by site and modality as well as providing aggregate numbers for the project as a whole for each of these factors. Barnett Ink has developed an encounter form which is currently in use on the project and this form's use will be continued.

The form effectively provides the data to track the number of patients pre-screened, whether each prescreen is positive or negative, the number of patients screened and the ASSIST and PHQ-9 score for each patient screened. In addition the process evaluation will report any training; publicity and public education activities, sustainability plans and activities, as well as Steering Committee meetings and policy changes recommended or enacted.

RFQ Requirement:

3.2.5 The successful bidder will conduct site mappings (flow charts) of the SBIRT process at each clinic for the purpose of analyzing the flow of the process and will make recommendations to address any barriers that impede the screening and intervention process.

Response: Barnett Ink will conduct work process mappings at the screening sites and prepare flow process charts to graphically display the results. The evaluators will analyze the results and will identify barriers or unnecessary steps that impede successful completion of the screening/service delivery process. They will communicate their findings and recommendations for improvement to the project in writing.

RFQ Requirement:

3.2.6 The successful bidder will be responsible for follow-up with 10% of a representative sample of clients who did receive brief intervention, brief treatment or referral to treatment. Data must be collected at 6 months after baseline and entered into the CSAT web-based reporting system. CSAT will provide vendor the sampling method to obtain the representative sample of 10 percent (10%). The vendor will be notified which clients have been selected as part of the representative sample and need to be located for follow-up via a Web-based notification report. State grantees are expected to achieve a follow-up rate of at least 80 percent (80%) of those selected for the follow-up sample. For example, if 100 patients are screened and should receive Brief Intervention, 10 clients will be in the CSAT selected sample to be followed up. The vendor will be required to attempt to locate all 10 clients. It is required that at a minimum eight of these clients complete a follow-up interview and that this information will be entered into the CSAT-GPRA SAIS web service.

Response: Barnett Ink will conduct 6 month follow-up interviews and enter the results of the interviews in the CSAT-GPRA SAIS website. Using the methodology specified by CSAT, Barnett Ink will randomly select a 10% representative sample of clients who receive brief intervention, brief treatment or referral to treatment for follow-up interviews 6 months after baseline. To achieve at least an 80% follow-up rate Barnett Ink will use its successful process for locating and interviewing clients due for follow-ups which includes the following:

- A locator form with contact information for client and person(s) who will know client's whereabouts
- A CSAT approved \$15 incentive with \$5 bonus if client initiates contact or \$5 for expenses (not to exceed \$20 per client)

- 1-800 computer-based call- in number for client use – sequentially calls 4 interviewers and puts voice-mail on computer and emails it if no answer
- Business card given to client with 1-800 number, dates of interview window and reminder about incentive they will receive
- Maintain contact by verifying phone number within 7 days; sending Welcome Letter within 15 days; sending Reminder Letter at 120 days
- Send HOT SHEET with clients in interview window to WWSBIRT staff and evaluation interviewers
- Make extensive attempts to track and contact clients due for interviews by calling at different times of days and on week-ends at least 8 times in first 14 days of interview window; contacting others listed on locator form beginning day 15; send “no Phone Letter” by day 21, send tracker/interviewer to client’s address.

RFQ Requirement:

3.2.7 The successful bidder will participate in weekly conference calls or other meetings as specified by the BHHF to present data reports, results of data implementation training, review of site reviews and recommendations from biannual and annual reports to SAMHSA. Likewise, a representative of the vendor will attend monthly Policy Steering Committee meetings as an ex-officio member and will present data related to meeting grant goals and objectives. Likewise, the vendor will report on "cultivation" of additional project sites and issues reported to overcoming barriers to sustainability efforts, such as state policy issues, and lack of "buy-in" from participating sites.

Response: The Evaluation Director and Evaluation Coordinator will participate in weekly conference calls and the Evaluation Director, or his designee will participate in other meetings as specified by BHHF to present data reports, results of training on data collection and reporting, site reviews and recommendations from the semi-annual and annual reports. The Evaluation Director or his designee will participate in Policy Steering committee meetings as an *ex officio* member to present data relating to progress on meeting goals and objectives of the project, site performance, sustainability, or other data relating to state policy issues.

RFQ Requirement:

3.2.8 The successful bidder will send a representative to the national SBIRT/AMERSA conference annually.

Response: The Evaluation Director or his designee will attend the national SBIRT grantee conference annually.

RFQ Requirement:

3.2.9 The successful bidder will attend GPRA training as provided by SAMHSA annually.

Response: A Barnett Ink evaluator will participate in GPRA training provided by SAMHSA annually.

RFQ Requirement:

3.2.10 The successful bidder will engage in a monthly "cohort" conference call made up of representatives from other state SBIRT projects.

Response: The Evaluation Director or the Evaluation Coordinator will participate in the monthly "cohort" conference calls with SAMHSA- CSAT and other SBIRT grantees.

RFQ Requirement:

3.2.11 The successful bidder will engage in meetings with the BHHF as needed to plan, access, and discuss recommendations made. Furthermore, the vendor will consult with the SBIRT Clinical Director weekly on all activities related to the project.

Response: Barnett Ink will engage in meetings with the BHHF as needed to plan, access, and discuss recommendations made. Barnett Ink will be available for weekly consultation with the Clinical Director to discuss activities related to the project.

RFQ Requirement:

3.2.12 The successful bidder will engage in any Technical Assistance visits scheduled with SAMHSA or their consultants to provide information in relation to completion of goals/objectives, site visits conducted and recommendations made.

Response: Barnett ink will engage in any Technical Assistance visits scheduled with SAMHSA or their consultants to provide information in relation to the completion of the goals/objectives, site visits conducted and recommendations made.

3.3 Training Manual:

RFQ Requirement:

3.3.1 The successful bidder shall provide a training manual, with the information above, for use during SBIRT implementation training and as a reference for SBIRT field staff.

Response: Barnett Ink will provide a training manual for each WWSBIRT staff member to use as a reference as well as a document source. This training manual will include:

- 1) Overview of the project, goals and objectives, core components and modalities, document flow, summary of forms and client ID protocol
- 2) Screening, pre-screening instruments, ASSIST and PHQ9 instruments as well as instructions on scoring and score recording
- 3) GPRA procedures including levels of treatment and completing the appropriate portions of the GPRA for SBIRT, services and discharge
- 4) Follow-up procedures and related forms
- 5) GPRA Question by Question Guide and Frequently Asked Questions as a reference.

3.4 Special Terms and Conditions:

3.4.1 - Bid and Performance Bonds: None Required

RFQ Requirement:

3.4.2 - Insurance Requirements:

The Vendor, as an independent contractor, is solely liable for the acts and omissions of its employees and agents. Proof of insurance shall be provided by the Vendor at the time the contract is awarded. The Vendor shall maintain and furnish proof of coverage of liability insurance for loss, damage, or injury (including death) of third parties arising from acts and omissions on the part of the Vendor, its agents and employees in the following amounts:

- a) **For bodily injury (including death): \$500,000.00 per person, minimum of \$1,000,000.00 per occurrence.**
- b) **For property damage and professional liability: Minimum \$1,000,000.00 per occurrence.**

Response: Proof of insurance as outlined in **Section 3.4.2 Insurance Requirements** (above) will be provided by Barnett Ink at the time the contract is awarded.

RFQ Requirement:

3.4.3 License Requirements:

The successful Vendor must present evidence of certification or licensure with the West Virginia Workers Compensation and Unemployment Funds, a copy of its W. Va. Business Certificate and any other licenses it may be required to hold by the nature of its operation.

Response: Barnett Ink will present evidence of certification with West Virginia Workers compensation and Unemployment and a copy of the Barnett Ink Business Certificate or number at the time the contract is awarded.

RFQ Requirement:

3.4.4 - Right of Review and Inspection:

The BHHF reserves the right to periodically review and inspect all documentation deemed pertinent to this agreement.

Response: Barnett Ink agrees to permit the BHHF the right to periodically review and inspect all documentation deemed pertinent to this agreement.

RFQ Requirement:

3.4.5 - Invoices, Progress, Payments and Retainage

The vendor shall submit invoices in arrears to the Agency at the address on the face of the purchase order labeled "Invoice To" pursuant to the terms of the contract. Payment will be made only upon approval of acceptable progress or deliverables as documented in the Vendors report. Invoices may not be submitted more than once monthly and State law forbids payment of invoices prior to receipt of services.

Response: Barnett Ink will submit invoices once per month to Health and Human Resources, Bureau for Behavioral Health and Health Facilities, Room 350, 350 Capitol Street, Charleston, WV 25301-3702. Invoices will reflect services which have been provided.

See Attachment 3 for line item budgets and budget narratives for Year 1, Optional Year 1 and Optional Year 2.

WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES
 BUREAU FOR BEHAVIORAL HEALTH AND HEALTH FACILITIES
 REQUEST FOR QUOTATION
 BHS12006

BID COST SHEET

Vendor's bid must include the billable hourly rate for each member/position.

Name or Position	Billable Hourly Rate
Evaluation Director	\$ Per Hour \$68.65
Evaluation Co-Director	\$ Per Hour \$52.50
Evaluation Coordinator	\$ Per Hour \$31.05
Statistician	\$ Per Hour \$46.15
Evaluation Database Manager	\$ Per Hour \$28.84
TOTAL PROJECT COST*	\$ 328,683

Optional Year One (1)

Name or Position	Billable Hourly Rate
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Evaluation Co-Director	\$ Per Hour \$52.50
Evaluation Coordinator	\$ Per Hour \$31.05
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Evaluation Database Manager	\$ Per Hour \$28.84
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**WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES
BUREAU FOR BEHAVIORAL HEALTH AND HEALTH FACILITIES
REQUEST FOR QUOTATION
BHS12006**

Optional Year two (2)

Name or Position	Billable Hourly Rate
Evaluation Director	\$ Per Hour \$68.65
Evaluation Co-Director	\$ Per Hour \$52.50
Evaluation Coordinator	\$ Per Hour \$31.05
Statistician	\$ Per Hour \$46.15
Evaluation Database Manager	\$ Per Hour \$28.84
TOTAL PROJECT COST*	\$ 306,023

***The total project cost is an all inclusive cost and includes all costs associated with the terms and conditions of the specifications.**

BHHF will use the Grand Total Bid Price for year one (1) and the two (2) optional renewal years from the Bid Price Sheet to determine the low-bid vendor and will award the contract to the lowest bidder meeting the requirements of all specifications.

Company Name:

Barnett Ink

Signature:



Title:

Chief Executive Officer

Date:

August 15, 2011

ATTACHMENT 1:

Documentation of at least 8 hours of training in the Government Results Reporting Act (GPRA) (General Requirement 3.1.2)

Certificate of Attendance

certifies that

Jeanie Budrus

has successfully completed the

Government Performance and Results Act (GPRA) Training of Trainers

April 14, 2010 to April 15, 2010
(Date)

New York, NY
(Location)


(Signature)

SAIS

SERVICES ACCOUNTABILITY IMPROVEMENT SYSTEM

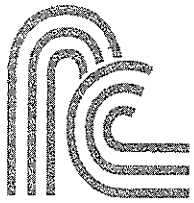
CSAT
Center for Substance Abuse Treatment



A Life in the Community for Everyone
SAMHSA
Substance Abuse and Mental Health Services Administration

ATTACHMENT 2:

Documentation of at least eighty (80) percent compliance rate on follow-up with a previous SAMHSA/CSAT grant (General Requirement 3.1.4).



Prestera Center FOR Mental Health Services INC

UNIVERSITY HEIGHTS • 3375 U S RT 60 E
P O BOX 8069 • PHONE (304) 525-7851
HUNTINGTON, WEST VIRGINIA 25705
FAX (304) 525-1504
www.prestera.org

Helping everyday people with everyday problems... every day!

CABELL COUNTY • MASON COUNTY • LINCOLN COUNTY • WAYNE COUNTY
KANAWHA COUNTY • BOONE COUNTY • CLAY COUNTY • PUTNAM COUNTY

August 11, 2011

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

Gentlemen:

Barnett Ink is a local evaluation company that has provided the third party evaluation services for several of Prestera Center's Substance Abuse and Mental Health Services Administration (SAMHSA) projects.

This letter serves to document that Barnett Ink has maintained a 6-month follow-up compliance rate of 80% or above with a previous SAMHSA/Center for Substance Abuse Treatment (CSAT) grant. As examples of maintaining the specified compliance:

- The SAMHSA/CSAT Young Offenders Re-entry Program grant (YORP), Re-entering Our Communities Successfully (ROCS) (TI-17046), evaluated by Barnett Ink, ended with a final 6-month follow-up rate of 88%.
- The SAMHSA/CSAT Assertive Adolescent Family Treatment grant (AAFT) Substance Treatment Available for Rural Students (STARS) (TI-17728), evaluated by Barnett Ink, ended with a final 6-month follow-up rate of 100%.

Please let me know if there are any questions regarding this information.

Sincerely,

Robert H. Hansen
Chief Executive Officer

ATTACHMENT 3:

Budget narratives and line item budget for Year 1, Optional Year 1 and Optional Year 2

West Virginia Department of Health and Human Resources
Bureau for Behavioral Health and Health Facilities
Request for Quotation
BHS 12006

YEAR ONE

Budget Narrative for Line Item Budget
to accompany Bid Cost Sheet-Total Project Cost
WVSBIRT Grant (9-30-11 to 9-29-12)

BARNETT INK
40 Marne Drive
Huntington, WV 25705

PERSONNEL

Evaluation Director: Dr. C. Robert Barnett will serve as the Evaluation Director at 50% FTE. He will be responsible for the operation of the evaluation, will direct the analysis of the program and the process and outcome evaluations. With the Evaluation Co-Director and Coordinator, he will prepare all semi-annual, annual and special reports for the project. He will participate in weekly conference calls with the WVSBIRT Clinical Director and partner agencies and will participate in project and Steering Committee meetings. He will conduct the financial operations for the evaluation doing the billing and disbursements of funds.

CONTRACTUAL COSTS

Line 1. The Evaluation Co-Director at 50% FTE will be responsible for analyzing performance data, developing data collection and reporting procedures and formats, conducting special analysis and reports as requested by the Evaluation Coordinator, program or the grantee agency, and with the Evaluation Director for finalizing the semi-annual report and coordinating and directing activities of evaluation staff. The Evaluation Co-Director will direct Process Mapping. The Evaluation Co-Director will assist the Program Director in working with the state contractor to develop the WVSBIRT data system.

Line 2. The Evaluation Coordinator will supervise the tracker/interviewers and data quality controller, supervise follow-up data collection and reporting, send weekly lists of clients due for follow-up interviews to their respective regions and clinics, maintain contact with clients by sending regular mailings, conduct training for evaluation and WVSBIRT staff, make site visits, participate in preparing in the reports to the project, attend Steering Committee meetings and meet regularly with the Clinical Supervisor and PI, participate in weekly conference calls with the WVSBIRT Clinical Director and partner agencies and in CSAT monthly conference calls, provide reports for special requests, and verify completeness and accuracy of data.

Line 3. The Statistician will conduct quarterly, semi-annual and annual statistical analysis of clients and outcome data, prepare special reports as needed and will assist the Evaluation Director and Co-Director in writing the statistical portions of reports.

Line 4. The Evaluation Database Manager will maintain the local databases for tracking clients in the follow-up pool and local evaluation and will assist in preparing weekly reports of intakes and services and in verifying data validity.

Line 5. The Follow-up Coordinator will coordinate payment of incentives, verify follow-ups have been entered on the CSAT web-site and supporting documentation of payment of incentives to clients has been received.

Line 6. Data Quality Controller will collect and check interviews for duplicates and incorrect information to assure that all of the interview information is recorded correctly. She will assist with conducting quarterly site visits.

Line 7. Travel to track/interview clients. Travel related to obtaining follow-up and discharge interviews is based on the average mileage per interview from past CSAT grants. We estimate 21 interviews will require travel to locate clients and conduct the interview. Federal rates are used in all travel costs; federal mileage rate is .55 in 2011.

Mileage for tracking clients and travel to interview .55 per mi x 78 miles (ave. round trip) x 21 = \$900.90 rounded to \$900

Line 8. CSAT Grantee meetings CSAT requires an evaluator to attend the national grantee conference. One GPRA training is also included in the contract requirements. Airfare, airport parking, ground transportation, hotel and meals are estimated to be \$2000 for the 3 day grantee conference and \$1000 for GPRA training.

Travel to one national conference and one training, for 1 evaluator \$3,000.

Line 9. In-state meetings. The Evaluation Coordinator and/or Evaluation Director, or Evaluation Co-director will make approximately 24 in-state trips to attend meetings such as steering committee, sustainability committee, data committee, technical assistance, and meetings with BHHF staff in Charleston. Travel expenses are based on mileage from Huntington to Charleston and return.

\$.55 per mi. X 2680 miles =	\$1,478
Parking \$5 X 24 =	<u>\$120</u>
	\$1598 rounded to \$1600

Line 10 Site visits/on-site training. The Evaluation Coordinator and/or Evaluation Director, or Co-director, or other Barnett Ink representative will make quarterly site visits to do process mapping and assess operations and in addition will provide 35 training sessions. The site visits will be conducted at the same time as training where possible. The estimated travel expense is based on the cost of one trip per site which is then multiplied by four quarters to estimate the cost of quarterly visits to the sites. The travel cost estimation is based on mileage from Huntington to each of the three Behavioral Health Centers and the geographical areas they serve and to Morgantown, WV.

Prestera

6 days travel	
108 ave. miles/ day. X \$.55= \$459.40X 6	\$356
Food 1.5 days X \$50/day	<u>\$75</u>
	\$431

FMRS 5 days

ACCESS (2days) 260mi. total X \$.55= \$143	\$143
Hotel \$110, meals 1.5 days @ \$50	\$185
Turnpike tolls	\$ 8
Beckley, New river , Monroe County (3 days)	
372 mi. @ \$.55=	\$205
Hotel \$110 X 2 nights, meals 2.5 Days @\$50	\$345
Turnpike tolls	<u>\$ 8</u>
	\$894

Westbrook

Parkersburg (2 days) 304 mi. @ \$.55	\$168
Hotel \$110, meals 1.5 days @ \$50	\$185
Roane & Gilmer Counties (2 days) 350 mi. @ \$.55	\$193
Hotel \$110 meals 1.5 days @ \$50	<u>\$185</u>
	\$731

Morgantown

Morgantown (2 days) 420 mi. @ \$.55	\$231
Hotel \$110 meals 1.5 days @ \$50	<u>\$185</u>
	\$416

Total per quarter	\$2,472
Times 4 quarters	<u>X 4</u>
Total travel	\$9888

OTHER

Line 1. Internet, cell phone 1-800 number Barnett Ink has established a toll free 1-800 number for clients to call in for follow-up interviews. Business use of cell phones and high speed Internet is figured at 60% of cost based on use for this project.

Line 2. Printing labels/forms The pre-screen forms completed by patients or staff at each screening site must have a label with a pre-printed WWSBIRT ID. Paper forms will continue to be used to submit negative pre-screens with approximately 48,000 labels per year needed.

Line 3. Printing Reports This includes printing the quarterly statistical reports, the semi-annual reports, and the annual reports to be sent to BHHF for distribution.

Line 4. Training Materials Thirty-five training sessions are scheduled During Year 4. Training manuals and printed forms are provided by Barnett Ink as part of the training process. We estimate that providing those materials will cost \$3,000.

Lines 5 to 7 INTERVIEW EXPENSES:

Reasons for interviews: The grant requires that GPRA data be collected at intake, discharge and 6 months after intake. The grant **requires that a minimum of 80%** of individuals in a follow-up pool selected by instructions from CSAT have a follow-up interview 6 months after admission to the program. **Failure to achieve an 80% follow-up rate may result in reduction of funds or in termination of the grant.**

“All SAMHSA grantees are required to collect and report certain data so that SAMHSA can meet its obligations under the Government Performance and Results Act (GPRA). CSAT’s GPRA requirements for this program include data collection and real time reporting about cooperative agreement-supported service recipients at baseline/intake, discharge and 6 months after intake. Grantees are also expected to obtain a minimum of an 80 percent (80%) follow-up rate on those clients selected as part of the follow-up sample.” (Source: Request for Applications (RFA) No. TI-08-001 pp. 12-13; and Appendix L – Reporting Requirements for SBIRT p. 86-89.)

“SAMHSA program officials will consider your progress in meeting goals and objectives, as well as your failures and strategies for overcoming them, when making an annual recommendation to continue the grant and the amount of any continuation award. Failure to meet stated goals and objectives may result in suspension or termination of the grant award, or in reduction or withholding of continuation awards.” (Source: Request for Applications (RFA) No. TI-08-001 Section VI-2 Administrative National Policy Requirements, p. 37)

Line 5. Interview Incentives. Incentives for participation in the follow-up interviews are permitted by the grantor for this grant.

“If you plan to provide incentives/compensate participants, specify the type (e.g., money, gifts, coupons), and the value of any such incentives. ... In no case may the value of an incentive paid for with SAMHSA discretionary grant funds exceed \$20. For the purpose of this project, incentives may be provided for follow-up only.” (Source: Request for Applications (RFA) No. TI-0001 Section I p. 34)

SAMHSA-CSAT recommends providing incentives to achieve a high follow-up rate. The Barnett Ink evaluation directors have attended 3 national trainings by CSAT and 2 program-specific technical assistance trainings funded by CSAT on how to achieve follow-ups rates of 80% or more. All 5 have recommended using incentives for clients.

A \$15 incentive will be offered for follow-up interviews. This has been the minimum amount which has proven effective in contributing to high follow-up rates in past CSAT grants for clients in rural communities in this state. A bonus of \$5 for clients who contact the program or evaluators for the follow-up was suggested during TA on how to increase follow-up rates and has proved effective with this population. Therefore clients will be given a base incentive of \$15 for their time in participating in the interview; if they have to travel to the interview site or contact the evaluators before tracking begins, they will receive an additional \$5 for a total of \$20.

We anticipate 720 clients will be due for follow-up interviews. Based on past experience with this client group, we estimate that 400 clients will receive \$20 for coming into the clinic to be interviewed. We estimate 320 will receive \$15 because they were interviewed in the field or will be telephoned by on-site interviewers. Incentives of \$20 x 400 clients = \$8,000. Incentives of \$15 x 320 clients = \$4,800.

Total Incentives = \$8,000+\$4,800=\$12,800.

Line 7. Fees for Off-site trackers/interviewers

Most clients will have been discharged prior to the date for the 6 month follow-up interview and will not be participating in the interviews as part of any services they are receiving from the WWSBIRT program. The Tracker/Off-Site Interviewers will locate and interview clients no longer in the program and clients in the program who cannot be interviewed at a clinic.

We anticipate that at least 100 clients will be interviewed by off-site tracker/interviewers and that many of clients will have to be tracked. The average cost of these interviews is \$40 per interview (includes time spent in tracking, traveling and conducting interviews).

Fees for off-site trackers/interviewers @\$40 x 100 = \$4,000.

Line 8. Fees for On-site interviewers

Most of the clients will be available for follow-up interviews by on-site staff because they return to the clinics for appointments or call for their interviews. Staff members who conduct on-site follow-up interviews are given performance award of \$15 per interview. Based on past performance we anticipate 620 on-site interviews.

Performance Awards for on-site interviewers $620 @ \$15 \times = \$9,300$.

**West Virginia Department of Health and Human Resources
Bureau for Behavioral Health and Health Facilities
Request for Quotation
BHS12006**

YEAR ONE Line Item Budget to accompany Bid Cost Sheet - Total Project Cost
WVSBIRT Grant (9-30-11 to 9-29-12)
BARNETT INK 40 Marne Dr., Huntington, WV 25705

Personnel:

Evaluation Director	.50%	\$ 71,400
Personnel Total		\$71,400

Fringe Benefits:

Health Insurance		\$ 1,440
Fringe Benefit Total		\$ 1,440

Supplies:

Office and Computer supplies	\$250 per month	\$ 3,000
Postage	\$150 per month	\$ 1,800
Supplies Total		\$ 4,800

Contractual Costs

Evaluation Co-Director	\$4550 per month	\$ 54,600
Evaluation Coordinator	\$5381 per month	\$ 64,575
Statistician	\$2000 per month	\$ 24,000
Evaluation Database Manager	\$500 per month	\$ 6,000
Follow-up Coordinator	\$25 x 240 hrs.	\$ 6,000
Data Quality Controller	\$15 x 1200 hrs.	\$ 18,000

Contractual Travel

Travel to track/interview clients	.55 per mile	\$ 900
CSAT Grantee Meetings	2 conferences	\$ 3,000
In-state meetings	24 (mileage, parking, meals)	\$ 1,600
Site visits/on-site training (mileage, meals, hotel)		\$ 9,888
Contractual Total		\$188,563

Other:

Internet, cell phone, 1-800 number	60% of cost	\$ 1,800
Printing labels/forms	\$100 per month	\$ 1,200
Printing reports		\$ 500
Training Materials		\$ 3,000
Interview Incentives	400 @ \$20; 320 @ \$15	\$12,800
Fees for off-site tracker/interviewers	100 @ \$40	\$ 4,000
Fees for on-site tracker/interviewers	620 @ \$15	\$ 9,300
Other Total		\$32,600

	Total Direct Costs	\$298,803
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Indirect Costs: Rate 10%

\$29,880

	TOTAL	<u>\$328,683</u>
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West Virginia Department of Health and Human Resources
Bureau for Behavioral Health and Health Facilities
Request for Quotation
BHS 12006

OPTIONAL YEAR ONE

Budget Narrative for Line Item Budget
to accompany Bid Cost Sheet-Total Project Cost
WVSBIRT Grant (9-30-12 to 9-29-13)

BARNETT INK
40 Marne Drive
Huntington, WV 25705

PERSONNEL

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Prestera

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ACCESS (2days) 260mi. total X \$.55= \$143	\$143
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of this project, incentives may be provided for follow-up only.” (Source: Request for Applications (RFA) No. TI-0001 Section I p. 34)

SAMHSA-CSAT recommends providing incentives to achieve a high follow-up rate. The Barnett Ink evaluation directors have attended 3 national trainings by CSAT and 2 program-specific technical assistance trainings funded by CSAT on how to achieve follow-ups rates of 80% or more. All 5 have recommended using incentives for clients.

A \$15 incentive will be offered for follow-up interviews. This has been the minimum amount which has proven effective in contributing to high follow-up rates in past CSAT grants for clients in rural communities in this state. A bonus of \$5 for clients who contact the program or evaluators for the follow-up was suggested during TA on how to increase follow-up rates and has proved effective with this population. Therefore clients will be given a base incentive of \$15 for their time in participating in the interview; if they have to travel to the interview site or contact the evaluators before tracking begins, they will receive an additional \$5 for a total of \$20.

We anticipate 720 clients will be due for follow-up interviews. Based on past experience with this client group, we estimate that 400 clients will receive \$20 for coming into the clinic to be interviewed. We estimate 320 will receive \$15 because they were interviewed in the field or will be telephoned by on-site interviewers. Incentives of \$20 x 400 clients = \$8,000. Incentives of \$15 x 320 clients = \$4,800.
Total Incentives = \$8,000 + \$4,800 = \$12,800.

Line 7. Fees for Off-site trackers/interviewers

Most clients will have been discharged prior to the date for the 6 month follow-up interview and will not be participating in the interviews as part of any services they are receiving from the WWSBIRT program. The Tracker/Off-Site Interviewers will locate and interview clients no longer in the program and clients in the program who cannot be interviewed at a clinic.

We anticipate that at least 100 clients will be interviewed by off-site tracker/interviewers and that many of clients will have to be tracked. The average cost of these interviews is \$40 per interview (includes time spent in tracking, traveling and conducting interviews).
Fees for off-site trackers/interviewers @\$40 x 100 = \$4,000.

Line 8. Fees for On-site interviewers

Most of the clients will be available for follow-up interviews by on-site staff because they return to the clinics for appointments or call for their interviews. Staff members who conduct on-site follow-up interviews are given performance award of \$15 per interview. Based on past performance we anticipate 620 on-site interviews.
Performance Awards for on-site interviewers 620@\$15 x = \$9,300.

**West Virginia Department of Health and Human Resources
Bureau for Behavioral Health and Health Facilities
Request for Quotation
BHS12006**

OPTIONAL YEAR ONE

**Line Item Budget to accompany Bid Cost Sheet - Total Project Cost
WVSBIRT GRANT (9-30-12 to 9-29-13)
BARNETT INK 40 Marne Dr., Huntington, WV 25705**

Personnel:

Evaluation Director	.50%	\$ 71,400
Personnel Total		\$71,400

Fringe Benefits:

Health Insurance		\$ 1,440
Fringe Benefit Total		\$ 1,440

Supplies:

Office and Computer supplies	\$250 per month	\$ 3,000
Postage	\$150 per month	\$ 1,800
Supplies Total		\$ 4,800

Contractual Costs

Evaluation Co-Director	\$4550 per month	\$ 54,600
Evaluation Coordinator	\$5381 per month	\$ 64,575
Statistician	\$2000 per month	\$ 24,000
Evaluation Database Manager	\$500 per month	\$ 6,000
Follow-up Coordinator	\$25 x 240 hrs.	\$ 6,000
Data Quality Controller	\$15 x 1200 hrs.	\$ 18,000

Contractual Travel

Travel to track/interview clients	.55 per mile	\$ 900
CSAT Grantee Meetings	2 conferences	\$ 3,000
In-state meetings 24 (mileage, parking, meals)		\$ 1,600
Site visits/on-site training (mileage, meals, hotel)		\$ 9,888
Contractual Total		\$188,563

Other:

Internet, cell phone, 1-800 number	60% of cost	\$ 1,800
Printing labels/forms	\$100 per month	\$ 1,200
Printing reports		\$ 500
Training Materials		\$ 3,000
Interview Incentives 400 @ \$20; 320 @ \$15		\$12,800
Fees for off-site tracker/interviewers 100 @ \$40		\$ 4,000
Fees for on-site tracker/interviewers 620 @ \$15		\$ 9,300
Other Total		\$32,600

Total Direct Costs \$298,803

Indirect Costs: Rate 10%

\$29,880

TOTAL \$328,683

West Virginia Department of Health and Human Resources
Bureau for Behavioral Health and Health Facilities
Request for Quotation
BHS 12006

OPTIONAL YEAR TWO -
WVSBIRT No-Cost Extension (9-30-13 to 9-29-14)
Budget Narrative for Line Item Budget with Bid Cost Sheet-Total Project
BARNETT INK 40 Marne Dr., Huntington, WV 25705

This Budget Narrative applies only if WWSBIRT is granted a No-Cost Extension. If WWSBIRT is granted a No-Cost Extension, full evaluation services will be required during the No-Cost Extension period and a Final Report will be required which covers the entire grant period including the No-Cost Extension.

During the last six months of a No-Cost Extension, projects are expected to begin to transition clients to programs that will continue after the end of the grant and the number of admissions will decrease. Clients admitted during the last 6 months of the grant will not be due for a follow-up before the end of the grant. Costs associated with follow-ups and intake materials will decrease. Most staff will be trained and only new staff will require training. Additional training on the GPRA for the evaluators will not be needed.

PERSONNEL

Evaluation Director: Dr. C. Robert Barnett will serve as the Evaluation Director at 50% FTE and will be responsible for the operation of the evaluation and will direct the analysis of the program and the process and outcome evaluations. With the Evaluation Co-Director, he will prepare all semi-annual, annual and special reports for the project. He will participate in weekly conference calls with the WWSBIRT Clinical Director and partner agencies and will participate in project and Steering Committee meetings. He will conduct the financial operations for the evaluation doing the billing and disbursements of funds.

CONTRACTUAL COSTS

Line 1. The Evaluation Co-Director at 50% FTE will be responsible for analyzing performance data, developing data collection and reporting procedures and formats, conducting special analysis and reports as requested by the Evaluation Coordinator, program or the grantee agency, and with the Evaluation Director for finalizing the semi-annual report and coordinating and directing activities of evaluation staff. The Evaluation Co-Director will direct Process Mapping. The Evaluation Co-Director will assist the Program Director in working with the state contractor to develop the WWSBIRT data system.

Line 2. The Evaluation Coordinator will supervise the tracker/interviewers and data quality controller, supervise follow-up data collection and reporting, send weekly lists of clients due for follow-up interviews to their respective regions and clinics, maintain contact with clients by sending regular mailings, conduct training for evaluation and WWSBIRT staff, make site visits, participate in preparing in the reports to the project, attend Steering Committee meetings and meet regularly with the Clinical Supervisor and PI, participate in weekly conference calls with the WWSBIRT Clinical Director and partner agencies and in CSAT monthly conference calls, and verify completeness and accuracy of data.

Line 3. The Statistician will conduct quarterly, semi-annual and annual statistical analysis of clients and outcome data, prepare special reports as needed and will assist the Evaluation Director and Co-Director in writing the statistical portions of reports.

Line 4. The Evaluation Database Manager will maintain the local databases for tracking clients in the follow-up pool and local evaluation and will assist in preparing weekly reports of intakes and services and in verifying data validity.

Line 5. The Follow-up Coordinator will coordinate payment of incentives, verify follow-ups have been entered on the CSAT web-site and supporting documentation of payment of incentives to clients has been received. Since the number of follow-ups will decrease, the Follow-Up Coordinator is expected to spend only 80 hours on these duties.

Line 6. Data Quality Controller will collect and check interviews for duplicates and incorrect information to assure that all of the interview information is recorded correctly. She will assist with conducting quarterly site visits.

Line 7. Travel to track/interview clients. Travel related to obtaining follow-up and discharge interviews is based on the average mileage per interview from past CSAT grants. We estimate 10 to 11 interviews will require travel to locate clients and conduct the interview. Federal rates are used in all travel costs; federal mileage rate is .55 in 2011.

Mileage for tracking clients and travel to interview .55 per mi x 78 miles (ave. round trip) x 11 = \$ 471 rounded to \$450

Line 8. CSAT Grantee meetings CSAT requires an evaluator to attend the national grantee conference. GPRA training would not be required. Airfare, airport parking, ground transportation, hotel and meals are estimated to be \$2000 for the 3 day grantee conference. Travel to one national conference and one training, for 1 evaluator \$2,000.

Line 9. In-state meetings. The Evaluation Coordinator and/or Evaluation Director, or Evaluation Co-director will make approximately 24 in-state trips to attend meetings such as steering committee, sustainability committee, data committee, technical assistance, and meetings with BHHF staff in Charleston. Travel expenses are based on mileage from Huntington to Charleston and return.

\$.55 per mi. X 2680 miles = \$1,478

Parking \$5 X 24 = \$120

\$1598 rounded to \$1600

Line 10 Site visits/on-site training. The Evaluation Coordinator and/or Evaluation Director, or Co-director, or other Barnett Ink representative will make quarterly site visits to do process mapping and assess operations and in addition will provide training sessions as needed for new staff. The site visits will be conducted at the same time as training where possible. The estimated travel expense is based on the cost of one trip per site which is then multiplied by four quarters to estimate the cost of quarterly visits to the sites. The travel cost estimation is based on mileage from Huntington to each of the three Behavioral Health Centers and the geographical areas they serve and to Morgantown, WV.

Pretera

6 days travel		
108 ave. miles/ day. X \$.55= \$459.40X 6		\$356
Food 1.5 days X \$50/day		<u>\$75</u>
		\$431

FMRS 5 days

ACCESS (2days) 260mi. total X \$.55= \$143		\$143
Hotel \$110, meals 1.5 days @ \$50		\$185
Turnpike tolls		\$ 8
Beckley, New river , Monroe County (3 days)		
372 mi. @ \$.55=		\$205
Hotel \$110 X 2 nights, meals 2.5 Days @\$50		\$345
Turnpike tolls		<u>\$ 8</u>
	\$894	

Westbrook

Parkersburg (2 days) 304 mi. @ \$.55		\$168
Hotel \$110, meals 1.5 days @ \$50		\$185
Roan & Gilmer Counties (2 days) 350 mi. @ \$.55		\$193
Hotel \$110 meals 1.5 days @ \$50		<u>\$185</u>
		\$731

Morgantown

Morgantown (2 days) 420 mi. @ \$.55		\$231
Hotel \$110 meals 1.5 days @ \$50		<u>\$185</u>
		\$416

Total per quarter	\$2,472
Times 4 quarters	<u>X 4</u>
Total travel	\$9888

OTHER

Line 1. Internet, cell phone 1-800 number Barnett Ink has established a toll free 1-800 number for clients to call in for follow-up interviews. Business use of cell phones and high speed Internet is figured at 60% of cost based of use for this project.

Line 2. Printing labels/forms The pre-screen forms completed by patients or staff at each screening site must have a label with a pre-printed WVS BIRT ID. Paper forms will continue to be used to submit negative pre-screens with approximately 24,000 to 30,000 labels needed during the no-cost extension.

Line 3. Printing Reports This includes printing the quarterly statistical reports, the semi-annual reports, and the annual reports to be sent to BHHF for distribution.

Line 4. Training Materials Although training will be reduced, training manuals and printed forms will be needed and will be provided by Barnett Ink as part of the training process. We estimate that providing those materials will cost \$1500 during the no-cost extension.

Lines 5 to 7 INTERVIEW EXPENSES:

Reasons for interviews: The grant requires that GPRA data be collected at intake, discharge and 6 months after intake. The grant **requires that a minimum of 80%** of individuals in a follow-up pool selected by instructions from CSAT have a follow-up interview 6 months after admission to the program. **Failure to achieve an 80% follow-up rate may result in reduction of funds or in termination of the grant.**

“All SAMHSA grantees are required to collect and report certain data so that SAMHSA can meet its obligations under the Government Performance and Results Act (GPRA). CSAT’s GPRA requirements for this program include data collection and real time reporting about cooperative agreement-supported service recipients at baseline/intake, discharge and 6 months after intake. Grantees are also expected to obtain a minimum of an 80 percent (80%) follow-up rate on those clients selected as part of the follow-up sample.” (Source: Request for Applications (RFA) No. TI-08-001 pp.12-13; and Appendix L – Reporting Requirements for SBIRT p.86-89.)

“SAMHSA program officials will consider your progress in meeting goals and objectives, as well as your failures and strategies for overcoming them, when making an annual recommendation to continue the grant and the amount of any continuation award. Failure to meet stated goals and objectives may result in suspension or termination of the grant award, or in reduction or withholding of continuation awards.” (Source: Request for Applications (RFA) No. TI-08-001 Section VI-2 Administrative National Policy Requirements, p. 37)

Line 5. Interview Incentives. Incentives for participation in the follow-up interviews are permitted by the grantor for this grant.

“If you plan to provide incentives/compensate participants, specify the type (e.g., money, gifts, coupons), and the value of any such incentives. ... In no case may the value of an incentive paid for with SAMHSA discretionary grant funds exceed \$20. For the purpose of this project, incentives may be provided for follow-up only.” (Source: Request for Applications (RFA) No. TI-0001 Section I p. 34)

SAMHSA-CSAT recommends providing incentives to achieve a high follow-up rate. The Barnett Ink evaluation directors have attended 3 national trainings by CSAT and 2 program-specific technical assistance trainings funded by CSAT on how to achieve follow-ups rates of 80% or more. All 5 have recommended using incentives for clients.

A \$15 incentive will be offered for follow-up interviews. This has been the minimum amount which has proven effective in contributing to high follow-up rates in past CSAT grants for clients in rural communities in this state. A bonus of \$5 for clients who contact the program or evaluators for the follow-up was suggested during TA on how to increase follow-up rates and has proved effective with this population. Therefore clients will be given a base incentive of \$15 for their time in participating in the interview; if they have to travel to the interview site or contact the evaluators before tracking begins, they will receive an additional \$5 for a total of \$20.

We anticipate 360 clients will be due for follow-up interviews. Based on past experience with this client group, we estimate that 200 clients will receive \$20 for coming into the clinic to be interviewed. We estimate 160 will receive \$15 because they were interviewed in the field or will be telephoned by on-site interviewers. Incentives of $\$20 \times 200 \text{ clients} = \$4,000$. Incentives of $\$15 \times 160 \text{ clients} = \$2,400$.

Total Incentives $= \$4,000 + \$2,400 = \$6,400$.

Line 7. Fees for Off-site trackers/interviewers

Most clients will have been discharged prior to the date for the 6 month follow-up interview and will not be participating in the interviews as part of any services they are receiving from the WWSBIRT program. The Tracker/Off-Site Interviewers will locate and interview clients no longer in the program and clients in the program who cannot be interviewed at a clinic.

We anticipate that at least 50 clients will be interviewed by off-site tracker/interviewers and that many of clients will have to be tracked. The average cost of these interviews is \$40 per interview (includes time spent in tracking, traveling and conducting interviews).

Fees for off-site trackers/interviewers $@\$40 \times 50 = \$2,000$.

Line 8. Fees for On-site interviewers

Most of the clients will be available for follow-up interviews by on-site staff because they return to the clinics for appointments or call for their interviews. Staff members who conduct on-site follow-up interviews are given performance award of \$15 per interview. Based on past performance we anticipate 310 on-site interviews.

Performance Awards for on-site interviewers $310 @ \$15 \times = \$4,650$.

**West Virginia Department of Health and Human Resources
Bureau for Behavioral Health and Health Facilities
Request for Quotation
BHS12006**

OPTIONAL YEAR TWO

Line Item Budget to accompany Bid Cost Sheet - Total Project Cost

This Budget will apply only if a No-Cost Extension Year is awarded to WWSBIRT for 9-29-13 to 9-30-14;
if a No-Cost Extension is not awarded to WWSBIRT, this budget will be null and void.

BARNETT INK 40 Marne Dr., Huntington, WV 25705

Personnel:

Evaluation Director	.50%	\$ 71,400
Personnel Total		\$71,400

Fringe Benefits:

Health Insurance		\$ 1,440
Fringe Benefit Total		\$ 1,440

Supplies:

Office and Computer supplies	\$250 per month	\$ 3,000
Postage	\$150 per month	\$ 1,800
Supplies Total		\$ 4,800

Contractual Costs:

Evaluation Co-Director	\$4550 per month	\$ 54,600
Evaluation Coordinator	\$5381 per month	\$ 64,575
Statistician	\$2000 per month	\$ 24,000
Evaluation Database Manager	\$ 500 per month	\$ 6,000
Follow-up Coordinator	\$ 25 x 80 hrs.	\$ 2,000
Data Quality Controller	\$ 15 x 1200 hrs.	\$ 18,000
Travel to track/interview clients	.55 per mile	\$ 450
CSAT Grantee Meetings	1 conference	\$ 2,000
In-state meetings	24 (mileage, parking, meals)	\$ 1,600
Site visits/on-site training (mileage, meals, hotel)		\$ 9,888
Contractual Total		\$183,113

Other:

Internet, cell phone, 1-800 number	60% of cost	\$ 1,800
Printing labels/forms	\$50 per month	\$ 600
Printing reports		\$ 500
Training Materials		\$ 1,500
Interview Incentives	200 @ \$20; 160 @ \$15	\$ 6,400
Fees for off-site tracker/interviewers	50 @ \$40	\$ 2,000
Fees for on-site tracker/interviewers	310 @ \$15	\$ 4,650
Other Total		\$ 17,450

Total Direct Costs **\$278,203**

Indirect Costs: Rate 10%

\$27,820

TOTAL **\$306,023**

RFQ No. BH 3 12006

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 exceed 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: BARNETT Ink

Authorized Signature: C. Roll Barnett Date: 8/21/11

State of West Virginia

County of Labell, to-wit:

Taken, subscribed, and sworn to before me this 12 day of August, 2011.

My Commission expires July 15, 2019, 2019.

AFFIX SEAL HERE

NOTARY PUBLIC

