



Tobi Johnson
& Associates

VENDOR PROPOSAL

Agency: West Virginia Division of Culture and History

Subject: Rural Volunteer Management Training Curriculum

RFP Number: CFRP 0432 DCH2000000003

Submitted By:

Tobi Johnson & Associates LLC
10300 Evening Ridge Lane, Knoxville, TN 37922
PH: 206-799-9038 / FAX: 865-675-7658

Contact:

Tobi Johnson, MA, CVA
EMAIL: tobi@volpro.net

A handwritten signature in blue ink, consisting of two distinct parts, one on the left and one on the right, connected by a horizontal line.

May 14, 2020

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Other Enclosures:

Proof of Small/Women Owned Business Status
Curriculum Vitae: Tobi Johnson
Resume: Valerie Mercadante

Project Description

To develop volunteer management curriculum that pairs traditional and modern tools and addresses the specific challenges faced by rural communities that seek to effectively mobilize volunteers. In addition, to train Volunteer West Virginia staff and local partners on effective volunteer engagement practices with a focus on the unique challenges of engaging volunteers in rural areas.

Project Timeframe

One year (12 months) from date of contract award.

Please Note: The vendor will comply with any and all current federal limitations and guidelines for travel and social distancing with respect to the COVID-19 pandemic and published by the Centers for disease Control. This may impact the timelines for live events.

Project Approach and Methodology

Our firm has over a decade of experience designing and developing training for volunteers, volunteer programs, and leaders of volunteers in both the public and nonprofit sectors. We are a member of the Association for Talent Development (formerly the American Society for Training and Development ASTD) and follow best practices in instructional design and delivery endorsed by that respected professional association.

The methodology we employ to build effective training curriculum is known as the ADDIE Model. This model is the foundation for the development of all training and skill-building, regardless of instructional method or delivery media employed.

With the ADDIE Model, analysis is the input for the system. Design, development, and evaluation are the processes. Implementation is the output.

We believe this proven approach is superior in that it has been tested and is widely-used methodology for instructional design professionals that results in a cost-effective project. Through both formative and summative evaluation, this purposeful framework ensures that every instructional design project achieves its stated goals with efficient use of resources resulting in maximum transformation and minimal re-design time.

ADDIE Model Stages

Analysis

In this stage, we will gather data that will inform the instructional and resource design process. Decisions about every aspect of the project are made here, as this information will be put to use throughout the system. During this stage, interviews with project leaders and stakeholders will be vital to understanding key project requirements, goals, end-users, technology, and limitations.

Design

In this stage, we will create the blueprint for the project with all the specifications necessary to complete all aspects of the project including the core curriculum, train-the-trainer course curriculum, additional learning modules, and online resource library. During this stage, interviews with Subject Matter Experts (SMEs) will help inform a job task analysis. Attention to detail is critical at this stage as we write the learning objectives, construct the outline and timing for courses, and complete the design plan.

Development

In this stage, we will develop the necessary materials for both learners and trainers. Everything from lecture notes to virtual reality is brought from design to deliverable. In addition, preliminary pilot testing of technology and review of electronic documents by key agency staff and advisory team members occurs at this stage. The pilot testing process allows organizations to implement any necessary changes in the project before the expenses associated with materials development are realized.

Implementation

In this stage, we will present the content during up to two live pilot tests with learners. In addition, training facilitators will also receive instruction on how to deliver the core curriculum. Evaluation will be used to gauge the degree to which learners meet objectives and facilitators or technologies deliver the modules successfully, after which all curriculum will be finalized.

Evaluation

Evaluation takes place at every step of the ADDIE Model to ensure that the project is progressing according to plan and that it will deliver on the goals established in the analysis phase.

Project Goals and Objectives

The curriculum developed for this project will focused on a mix of current volunteer management best practices, online communications engagement, and community organizing strategies designed to engage rural residents in meaningful, focused opportunities that address serious community issue.

Each module will include highly practical, action-orient strategies and tools with a focus on action and results, rather than volunteer management theory. In addition, all materials will have a consistent look and feel that conforms with Volunteer West Virginia's brand guidelines and style guide.

In addition, the vendor will engage in ongoing communication and coaching with project sponsor and advisory panel throughout the duration of the project.

Project Goals

Goal 1: Develop, test and revise an in-person 3-hour Rural Volunteer Management Core Curriculum that addresses the challenges faced by rural communities and uses best practices in volunteer recruitment, retention, recognition and screening.

The principal consultant has over fifteen years of direct, boots-on the-ground experience in volunteer training, partner outreach, and community mobilization in rural settings both as a leader of volunteers and a consultant. The content of the curriculum design will be informed by this experience, in collaboration with input from Volunteer west Virginia agency staff, the project's advisory panel, and local Subject Matter Experts (SMEs).

Deliverables for the core curriculum will include a job ask analyses and prioritized list of essential learning objectives and curriculum outline, based on Subject Matter Expert (SME) interviews, review of prior focus group results, and literature review. In addition, slide decks, training agendas, and detailed speaker notes will be included.

Goal 2: Develop, test and revise a companion in-person train-the-trainer course curriculum inclusive of the core curriculum and four additional modules.

The train-the-trainer module will help experienced and new learning facilitators alike learn to present the Rural Volunteer Management Core Curriculum in a consistent, effective, and engaging manner.

Deliverables for the train-the-trainer module will include slide decks, training agendas, and detailed speaker notes for workshops.

In addition, both the train-the-trainer course curriculum (noted above in Goal 1) and the four stand-alone modules (noted below in Goal 3) will be pilot tested in an in-person environment over the course of two trips and revisions made based on the results of the training program observations and evaluation form.

Goal 3: Create four additional 90-minute stand-alone learning modules for the purpose of professional development for volunteer managers.

These modules will be designed to be presented in-person or online by Volunteer West Virginia staff or staff at volunteer centers.

Deliverables for the stand-alone learning modules will include slide decks, training agendas, and detailed speaker notes for each module. Modules will be designed to that they may be delivered online via webcast or in-person.

A list of module topics will be finalized in collaboration with Volunteer West Virginia Staff and the advisory panel. Current topics of interest include: Developing your Board of Directors; How to be ready for group projects and service days; New approaches to volunteerism; Intergenerational Volunteering; Legal Issues and Liability Concerns; Strengthening Internal Operations to better support volunteers.

Goal 4: Develop an online resource library that includes templates, tools and links with appropriate guidance and tutorials to support the work of volunteer managers in rural communities.

Our firm has over five years of experience building and maintaining online communities for leaders of volunteers. We understand what goes into designing an online portal that is not only useful, but frequently used.

The online resource library will be designed to offer supplemental support and guidance to leaders of volunteers. Templates, tools, links, and tutorials will align with, and compliment the topics covered in the core curriculum training as well as the four stand-alone learning modules.

The resource library will be comprised of weblinks to resources provided by others and made freely available to the public and may include materials developed specifically for the client. The extent of resources provided will be determined by the available budget and will be designed to be as useful as possible to leaders of volunteers.

The vendor will consult with the client on possible technology platform options and the design of online resource library. The client will purchase (or host) and maintain the resource library, and the vendor will design a

resource taxonomy, write micro copy for the site, and organize and upload materials to the platform. The focus will be on creating a hassle-free user experience.

Note: Client will be responsible for printing (or distributing electronically) training materials, room rental, set up, projection, and any A/V fees.

Qualifications and Experience

Primary Project Consultant – Tobi Johnson, MA, CVA

Tobi Johnson is an internationally sought-after expert, consultant, and master trainer in volunteer engagement. She is known for her modern thought leadership, highly practical evidence-based strategies, and innovative, “big hat” thinking around engaging, supporting, and acknowledging the work of volunteers.

Tobi is the President of [Tobi Johnson & Associates](#), a consulting firm whose mission is to help nonprofit organizations make connections with remarkable volunteers. In 2015, she founded [VolunteerPro](#), an online training hub and networking community for leaders of volunteers. Tobi has developed curriculum and trained thousands of volunteer professionals around the world in modern volunteer management practices that meet the needs of today’s volunteers.

Last year, she joined with Jennifer Bennett of VolunteerMatch to launch the [Time + Talent Podcast](#) where, each season, volunteer managers share their most innovative practices.

Tobi has over 25 years direct experience in nonprofit management, program development, program coordination, training delivery and learning design in the social sector. She wrote Chapter 1 of [Volunteer Engagement 2.0: Ideas and Insights for Transforming Volunteer Programs in a Changing World](#).

In addition, Tobi is intimately knowledgeable about the professional development needs of today’s leaders of volunteers. She was the Chair for the **Certified in Volunteer Administration (CVA) Job Analysis Task Force**; responsible for updating the required the [competency model](#) for the field’s only internationally recognized professional credential.

Each year she conducts the [Volunteer Management Progress Report](#), a global state-of-the-industry survey for leaders of volunteers. For the 2020 report, over 1,300 professionals from 22 countries participated. This practitioner-based research was recently [featured in a peer-reviewed academic journal](#).

A native of the Pacific Northwest, Tobi is a graduate of the University of Washington and has a Master's degree from the School of the Art Institute of Chicago. She now lives in East Tennessee with her husband and feline office assistant, Bailey. See attached CV for additional experience, publications, and thought leadership.

References:

- Tobi Johnson, Big Shifts That Will Change Volunteerism for the Better (2015) Volunteer ENGAGEMENT 2.0: Ideas and insights changing the world, Robert J. Rosenthal (ed.), John Wiley & Sons, Inc., 1-19 - <https://onlinelibrary.wiley.com/doi/book/10.1002/9781119154792>
- Chair of CVA Job Analysis Task Force - Council for Certification in Volunteer Administration (CCVA), Body of Knowledge and Competency Framework (see page 13, Contributors) - <https://cvacert.org/wp-content/uploads/2015/09/2015-CVA-Competency-Framework-FINAL-2015-Sep-03.pdf>
- Certified in Volunteer Administration (CVA) Credential, Council for Certification in Volunteer Administration (CCVA) since February 2013 (see Current Registry of CVAs - <https://cvacert.org/wp-content/uploads/2020/05/May-2020-Current-CVAs.pdf>)
- Pam Kappelides & Tobi Johnson (2020) A Heavy Load: Challenges and Current Practices for Volunteer Managers in the USA, Australia, and Canada, Journal of Nonprofit & Public Sector Marketing, 32:1, 4-24, DOI: [10.1080/10495142.2019.1668329](https://doi.org/10.1080/10495142.2019.1668329)

Project Associate - Valerie Mercadante

Valerie Mercadante will be the firm's dedicated associate to this project. She will be responsible for content development, formatting, and quality assurance.

As a nonprofit professional with seven years in the field working directly in volunteer engagement and fundraising, she is uniquely positioned to assist in building curriculum that supports volunteer engagement professionals as they seek to scale their impact through effective volunteer program planning and training.

Valerie worked for seven years as Development & Engagement Coordinator at Oakland Family Services, a multi-serve agency serving individuals, children and families. She understands the unique challenges of volunteer management. In just one year, she was able to overcome barriers to involvement by

strengthening volunteer programming which increased the organization's volunteer base by 375% in a single year.

In addition to her volunteer management experience, Valerie is well versed in event coordination and fundraising. She was responsible for designing and implementing successful corporate relations initiatives that led to event sponsorships, major gift donors, and grants, totaling \$75,000.

Finally, Valerie has a lifetime of direct experience as a community volunteer and is currently the PTA President at her local elementary school. She understands what drives people to get involved in their community - it's about hearing, understanding and catering to their unique motivations to serve and support their communities.

Valerie graduated from Eastern Michigan University with her Bachelor's Degree. is currently studying, and leading, a study group of practitioners preparing to sit for the fall CVA Exam. See attached resume for additional experience and qualifications.

Client Results

The following are only a few examples of concrete results gained by our customers. See attached CV for a select list of past projects.

- A large volunteer-driven tax prep program increased its volunteer corps by 33% the following tax season as a result of recommendations from a Volunteer Landscape Analysis conducted by the consultant.
- A state-based volunteer program's performance ranking rose from 45th in the nation to 36th in the nation in one year, as a result of a performance management system, tools, and coaching developed by the consultant.
- All ten volunteer programs in a network that received coaching met or exceeded volunteer recruitment goals for 19 rural counties due to technical assistance, training, and tools developed by the consultant.
- A statewide program doubled the number of annual outreach events held through the development of an extensive annual enrollment toolkit, templates, and training presented by the consultant.
- As an employee, the consultant built and successfully staffed an employment and training program, supported by volunteer mentors, for homeless youth from the ground up that is still in existence today, two decades later.

Professional References

The following are a list of recent organizations for which we have completed work. Each offers a different aspect of our services and expertise.

- **Dustin Deel**
Municipal/Community Services Director
City of Weatherford, Weatherford Animal Shelter
PO Box 255
Weatherford, TX 76086
817-454-2759
ddeel@weatherfordtx.gov

Project – Working with volunteer-staff advisory team, re-designed volunteer program from the ground up, including volunteer orientation curriculum and staff training for rural volunteer program
- **Kevin C. Wilkes**
Chief Security Officer (CSO)
Pittsburgh Cultural Trust
803 Liberty Avenue
Pittsburgh, PA 15222
412-471-6074
wilkes@trustarts.org

Project – Conducted extensive volunteer program assessment including interviews, focus groups, and literature review with stakeholders from diverse backgrounds
- **Allison Gallaher**
Executive Director
Volunteer East TN
P.O. Box 1229
Knoxville, TN 37901
856-865-582-4085 x291
agallaher@volunteeretn.org

Project – Designed and conducted full-day volunteer management bootcamp for new volunteer coordinators located in East Tennessee

- **Rebecca Verhoff-Kiss**
Outreach & Education Officer
ServeOhio
614-995-5269
Rebecca.Verhoff-Kiss@serveohio.gov

Project - Keynote and workshop speaker at 2019 statewide conference, spoke on volunteer management strategy and societal shifts that impact volunteerism

- **Maryalice Crofton**
Executive Director
Maine Commission for Community Service
207-624-7792
Maryalice.Crofton@maine.gov

Project - Keynote and workshop speaker at two state conferences (2016 & 2017), spoke on volunteer management strategy, societal shifts that impact volunteerism, and current research on volunteer management



ALLAN L. MCVEY
CABINET SECRETARY

STATE OF WEST VIRGINIA
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON STREET, EAST
CHARLESTON, WEST VIRGINIA 25305-0130

W. MICHAEL SHEETS
DIRECTOR

March 18, 2020

Tobi Johnson & Associates, LLC
PO Box 23408
Knoxville, TN 37933-1408

Ms. Johnson:

This is to notify you that your Small, Women-, and Minority-Owned Businesses (SWAM) Certification Application has been approved on the basis of your representations that the vendor named above meets the definition of a Small, Women-, and Minority-Owned Businesses as set forth in the **West Virginia Code of State Rules** 148-22-1 et seq. This certification becomes effective:

3/18/2020

And shall automatically expire without notice two years after the effective date unless revoked by the Purchasing Director or upon expiration pursuant to the **West Virginia Code of State Rules** 148-22-8. The type(s) of Small, Women-, and Minority-Owned Businesses (SWAM) Certification approved for your entity:

Small Business Women Owned Business

To maintain certification without lapse, a certified business shall apply to renew its certification at least 60 days prior to the end of the two-year certification period. Complete renewal instructions, recertification forms, and a list of all SWAM Certified entities are available online at www.state.wv.us/admin/purchase/VendorReg.html.

If you have questions, please contact the West Virginia Purchasing Division at 304-558-2306.

Sincerely,

Lu Anne Cottrill
Assisting Registration Coordinator

TOBI JOHNSON, MA, CVA

10300 Evening Ridge Lane
Knoxville, TN 37922 USA
Ph (206) 799-9038
tobi@tobjohnson.com

EDUCATION

School of the Art Institute of Chicago, Chicago, IL 1994
Master of Arts, Modern Art History, Theory and Criticism

University of Washington, Seattle, WA 1987
Bachelor of Arts, Art History and Studio Arts

PROFESSIONAL ASSOCIATIONS & CERTIFICATION

Council for Certification In Volunteer Administration 2013 - Present
Certified in Volunteer Administration (CVA) Designation

**Association for Research on Nonprofit Organizations
and Voluntary Action (ARNOVA)** 2014 - Present
Member, Pracademics Section

Association for Talent Development (ATD) 2013 - Present
Member

Association for Leadership In Volunteer Engagement (ALIVE) 2014 - Present
Member

International Association for Volunteer Effort (IAVE) 2017 - Present
Member

PROFESSIONAL EXPERIENCE

Tobi Johnson & Associates | VolunteerPro
President, Founder, & Principal March 2009 - Present
Knoxville, Tennessee

Leader of management consulting firm focused on strengthening volunteer and service programs in the nonprofit and government sectors. Internationally recognized expert and speaker on nonprofit management and volunteer engagement, training, and certification.

Recent Company Projects:

- **VolunteerPro** (founder) – Online professional development community for leaders of volunteers featuring ongoing webinars, forum, and resource library (2015 – present)
- **National Council for Social Service (Singapore)** – Keynote speaker and workshop presenter at Global Leaders Summit (2019)
- **Weatherford Parker County Animal Shelter** – Full program design, including volunteer orientation curriculum and staff training for rural volunteer program (Fall 2018-Spring 2019)
- **New York Department of Consumer Affairs, Office of Financial Empowerment** – Comprehensive program assessment for tax prep volunteer program including surveys, focus groups, interviews and a final report with extensive recommendations (Summer 2018)
- **Pittsburgh Cultural Trust** – In-depth volunteer program assessment and report with extensive recommendations (December 2017)

- **2017 National Summit on Volunteer Engagement Leadership** – Workshop presenter (two sessions) and co-leader of national strategy session on partnership development
- **Volunteering Victoria, Volunteering Western Australia, Volunteering Centre (Sydney), Volunteering South Australia/Northern Territory, Volunteering Queensland** – Keynote speaker and workshop leader at all five Australian state conferences (2017)
- **Pennsylvania Department of Aging Volunteer Conference** – Workshop presenter on best practices in volunteer management (April 2017)
- **UK National Trust** – Design and production of instructional video tutorial for Convestival, conference for volunteer managers (June (2016)
- **Volunteer Administrators Network San Diego** – Workshop presenter for regional association of volunteer managers (June (2016)
- **Volunteering Australia** – Keynote speaker and workshop leader for National Volunteering Conference (April 2016)
- **ProBono Australia** – Presenter and panelist for professional development webinars (January- March 2016)
- **CharityHowTo** – Featured topic expert and webinar presenter (2015 – present).
- **Pennsylvania APPRISE** - Performance improvement strategy, design and development of blended learning and online certification program, team coaching and training, implementation of self-directed volunteer team model (2010- current)
- **Meals on Wheels Association of America** – Conference workshop speaker and presenter of national professional development webinars (2013-current)
- **Points of Light Foundation**– Workshop presenter for National Conference on Volunteering and Service and Certified Service Enterprise Consultant (2014-current)
- **The Aging Network’s Volunteer Collaborative, National Association of Area Agencies on Aging** - National professional development webinars, partnership and development of national online resource library (2012-2013)
- **Tennessee State Health Insurance Program (TN SHIP)** – Annual Medicare Enrollment Toolkit and training for rural volunteer teams (2012)

Enroll America

State Director, Tennessee

November 2013 - May 2014

Urban and rural community organizing and partnership development across Tennessee
Knoxville, Tennessee

Statewide Health Insurance Benefits Advisors (SHIBA) HelpLine

Washington State Office of Insurance Commissioner

Regional Manager & Program Director

October 2002 - March 2009

Curriculum design and training of volunteers in rural and urban settings in northwest Washington State, then promoted to executive leadership position at agency
Tumwater, Washington

YWCA of Seattle, King County, Snohomish County

Director, Youth Opportunity

May, 2000 - April 2002

Seattle, Washington

Larkin Street Youth Center

Director, Employment/Education Services

April 1998 - March 2000

San Francisco, California

US Department of Labor, Office of Job Corps

Regional Outreach Coordinator

June 1993 - April 1998

Chicago, Illinois & San Francisco, California

RELATED EXPERIENCE

Certified Master Gardener Executive Committee, Knox County Cooperative Extension	2016 - 2019
Volunteer & Board Member, Tennessee Health Care Campaign	2009 - 2015
Fellow, Salzburg Seminar Salzburg, Austria	1999

PUBLICATIONS & THOUGHT LEADERSHIP

Johnson, T. (2010-current). Tobi's Volunteer Management Blog (blog, self published). Retrieve posts from: <http://www.tobjohnson.com/blog/>

Kappelides, P, & Johnson, T. (2020) A Heavy Load: Challenges and Current Practices for Volunteer Managers in the USA, Australia, and Canada, *Journal of Nonprofit & Public Sector Marketing*, 32:1, 4-24, DOI: [10.1080/10495142.2019.1668329](https://doi.org/10.1080/10495142.2019.1668329)

Johnson, T. (e-volunteerism Journal, [Volume XVII, Issue 1, October 2016 - January 2017](#)), *Working with Human Nature, Not Against It: Using Brain Science to Boost Volunteer Engagement*

Volunteer Management Progress Report, (2015-2018 industry research report, self published). Retrieve from: <http://volpro.net/volunteer-management-progress-report/>

Johnson, T. (January 12, 2016). *What Must Australian Volunteerism Lost to Win?* (op ed). ProBono Australia News. Retrieve from: <http://probonoaustralia.com.au/news/2016/01/what-must-australian-volunteerism-lose-win/>

Johnson, T. (2015). Big Shifts That Will Change Volunteerism for the Better (Chapter 1), Rosenthal, Robert, ed., *Volunteer Engagement 2.0: Ideas and Insights Changing the World* (pp. 3-19). Hoboken, NJ: Wiley & Sons. Inc.

Johnson, T. (2016). *The New Volunteer Manager: The First 90 Days, 2nd Ed.* (eBook, self-published). Retrieve from: <http://www.tobjohnson.com/2014/01/05/the-new-volunteer-coordinator-the-first-90-days-22-big-picture-tips-to-rock-your-volunteer-program/>

Johnson, T. (September 2011). Role Reversal: Volunteerism's Identity Crisis. Macduff, N., ed. *Volunteer Today* (e-journal, no longer in print)

VALERIE MERCADANTE

High Energy & Committed Volunteer Engagement Professional

PROFILE

Every nonprofit has the capacity to scale impact through its volunteer program. A well designed volunteer program engages a supportive network, both internal and external, to deliver measurable results that will help reach organizational goals. And together with my colleagues at VolunteerPro, I have the skills that will provide you with the tools you need to modernize your volunteer program.

Through my work, I help leaders of volunteers with ongoing support, evidence-based strategies, time-saving resources and a proven, road-tested path to create mastery in volunteer management.

AREAS OF EXPERTISE:

Nonprofits, Volunteer Coordination, Volunteer Engagement, Volunteer Management, Social Media Management, Writing and Editing, Project Management, Research and Data Analysis, Customer Service, Community Management

WORK EXPERIENCE

VolunteerPro/Tobi Johnson and Associates, Executive Assistant
Sept. 2019-present. Work closely with the company president to provide a variety of administrative and marketing support.

- Engage with online, international communities of volunteer management professionals, providing resources, research and support.
- Write research backed blog posts, newsletters, guides, eBooks, and other content, focused on volunteer engagement, leadership and general nonprofit management.
- Develop digital materials, such as workbooks, tipsheets, worksheets and guides, to support nonprofit staff's professional development in volunteer management skills.
- Provide online webinar support and audience engagement during livestream trainings and webinars.
- Collaborate with a remote team and create detailed project plans in Airtable.

Oakland Family Services, Development & Engagement Coordinator,
Oct. 2013-Sept. 2019. Directed the vision of our volunteer program for the agency and increased volunteer base by 375% in 1 year. Created successful corporate relations initiatives that led to event sponsorships, major gift donors, and grants, totaling \$75,000.

- Worked with senior leadership team to achieve fundraising goals by planning and executing creative and innovative events that engage various constituents and deepen their relationship and involvement with the organization.
- Led teams of volunteers to conceptualize events from start to finish; including: defining event goals, developing budgets and timelines, promoting events to the community, and creating follow up procedures to guide process improvements.
- Collaborated with marketing and communications staff to master multiple tasks and projects in regard to event promotions and materials, strategic planning, and volunteer management.
- Coordinated teams of volunteers to ensure tasks are completed in support of community impact projects, vendor relations and event logistics.

EDUCATION

Bachelors of Arts
Literature

Eastern Michigan University

PROFESSIONAL SKILLS

PROJECT MANAGEMENT
COMMUNITY ENGAGEMENT
WRITTEN & VERBAL COMMUNICATIONS
DATA MANAGEMENT
RESEARCH
PRIORITIZING TASKS
TRAVEL PLANNING
RELATIONSHIP MANAGEMENT

VALERIE MERCADANTE

High Energy & Committed Executive Assistant

WORK EXPERIENCE CONTINUED

Richter and Associates, Administrative Assistant, 4/2013-10/2013 promoted to an assistant from the receptionist (within 2 months), by taking initiative teaching myself industry policies, procedures, and trends.


- Trusted resource to produce self-motivated work in a team environment supporting business owners and a team of 5 agents by prioritizing client needs, drafting outgoing correspondence and scheduling meetings.
- Greeted visitors and callers promptly, and connected them with the appropriate party.
- Resolved customer issues and complaints with clear communication on policies, procedures, and expectations.
- Exercised independent decision making in office management duties to support the daily functioning of office needs.

COMMUNITY INVOLVEMENT

- **Read to a Child:** Advocate for literacy awareness and help develop a love for reading by mentoring an elementary school age child.
- **Leader Dogs for the Blind:** Provide companionship and stress release for dogs in a rigorous training program.
- **PTA Leader:** Lead a team of volunteers working together to plan school fundraising events.
- **Ellevate Detroit Member:** A community of professional women committed to helping each other succeed.

CONTACT ME

 valerie.mercadante@gmail.com

 734-239-1103

 www.linkedin.com/in/valmercadante

PERSONAL TRAITS

COLLABORATIVE
ANALYTICAL
INNOVATIVE
POSITIVE
PROACTIVE
SELF MOTIVATED
FUTURE FOCUSED

TECHNICAL SKILLS

CRM'S: ETAPESTERY, NEON,
ACTIVE CAMPAIGN

MICROSOFT OFFICE SUITE

OFFICE 365

PROJECT MANAGEMENT AND
COLLABORATION SOFTWARES

UNLIMITED ABILITY AND
POTENTIAL TO LEARN NEW
SKILLS!

REQUEST FOR PROPOSAL
Department of Arts, Culture and History
Volunteer West Virginia
DCH2000000001

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SECTION 1: GENERAL INFORMATION

1.1. Introduction:

The West Virginia Department of Administration, Purchasing Division (hereinafter referred to as the "Purchasing Division") is issuing this solicitation as a request for proposal ("RFP"), as authorized by W. Va. Code §5A-3-10b, for the West Virginia Commission for National and Community Service (dba Volunteer West Virginia) (hereinafter referred to as the "Agency") to provide rural volunteer management training curriculum development and resource library.

The RFP is a procurement method in which vendors submit proposals in response to the request for proposal published by the Purchasing Division. It requires an award to the highest scoring vendor, rather than the lowest cost vendor, based upon a technical evaluation of the vendor's technical proposal and a cost evaluation. This is referred to as a best value procurement. Through their proposals, vendors offer a solution to the objectives, problem, or need specified in the RFP, and define how they intend to meet (or exceed) the RFP requirements.

1.2. RFP Schedule of Events:

RFP Released to Public.....	03/16/2020
Vendor's Written Questions Submission Deadline	03/24/2020
Addendum Issued.....	TBA
Technical Bid Opening Date.....	04/08/2020
Technical Evaluation Begins	TBA
Cost Bid Opening.....	TBA
Cost Evaluation Begins.....	TBA
Contract Award Made.....	TBA

REQUEST FOR PROPOSAL
Department of Arts Culture and History
Volunteer West Virginia
DCH2000000001

SECTION 2: INSTRUCTIONS TO VENDORS SUBMITTING BIDS

Instructions begin on next page.

INSTRUCTIONS TO VENDORS SUBMITTING BIDS

1. REVIEW DOCUMENTS THOROUGHLY: The attached documents contain a solicitation for bids. Please read these instructions and all documents attached in their entirety. These instructions provide critical information about requirements that if overlooked could lead to disqualification of a Vendor's bid. All bids must be submitted in accordance with the provisions contained in these instructions and the Solicitation. Failure to do so may result in disqualification of Vendor's bid.

2. MANDATORY TERMS: The Solicitation may contain mandatory provisions identified by the use of the words "must," "will," and "shall." Failure to comply with a mandatory term in the Solicitation will result in bid disqualification.

3. PREBID MEETING: The item identified below shall apply to this Solicitation.

A pre-bid meeting will not be held prior to bid opening

A **MANDATORY PRE-BID** meeting will be held at the following place and time:

All Vendors submitting a bid must attend the mandatory pre-bid meeting. Failure to attend the mandatory pre-bid meeting shall result in disqualification of the Vendor's bid. No one individual is permitted to represent more than one vendor at the pre-bid meeting. Any individual that does attempt to represent two or more vendors will be required to select one vendor to which the individual's attendance will be attributed. The vendors not selected will be deemed to have not attended the pre-bid meeting unless another individual attended on their behalf.

An attendance sheet provided at the pre-bid meeting shall serve as the official document verifying attendance. Any person attending the pre-bid meeting on behalf of a Vendor must list on the attendance sheet his or her name and the name of the Vendor he or she is representing.

Additionally, the person attending the pre-bid meeting should include the Vendor's E-Mail address, phone number, and Fax number on the attendance sheet. It is the Vendor's responsibility to locate the attendance sheet and provide the required information. Failure to complete the attendance sheet as required may result in disqualification of Vendor's bid.

All Vendors should arrive prior to the starting time for the pre-bid. Vendors who arrive after the starting time but prior to the end of the pre-bid will be permitted to sign in but are charged with knowing all matters discussed at the pre-bid.

Questions submitted at least five business days prior to a scheduled pre-bid will be discussed at the pre-bid meeting if possible. Any discussions or answers to questions at the pre-bid meeting
Revised 01/09/2020

are preliminary in nature and are non-binding. Official and binding answers to questions will be published in a written addendum to the Solicitation prior to bid opening.

4. VENDOR QUESTION DEADLINE: Vendors may submit questions relating to this Solicitation to the Purchasing Division. Questions must be submitted in writing. All questions must be submitted on or before the date listed below and to the address listed below in order to be considered. A written response will be published in a Solicitation addendum if a response is possible and appropriate. Non-written discussions, conversations, or questions and answers regarding this Solicitation are preliminary in nature and are nonbinding.

Submitted e-mails should have solicitation number in the subject line.

Question Submission Deadline: **March 24th, 2020 due by 10am**

Submit Questions to: **Dusty Smith**
2019 Washington Street, East
Charleston, WV 25305
Fax: (304) 558-4115 (Vendors should not use this fax number for bid submission)
Email: Dusty.J.Smith@wv.gov

5. VERBAL COMMUNICATION: Any verbal communication between the Vendor and any State personnel is not binding, including verbal communication at the mandatory pre-bid conference. Only information issued in writing and added to the Solicitation by an official written addendum by the Purchasing Division is binding.

6. BID SUBMISSION: All bids must be submitted electronically through wvOASIS or signed and delivered by the Vendor to the Purchasing Division at the address listed below on or before the date and time of the bid opening. Any bid received by the Purchasing Division staff is considered to be in the possession of the Purchasing Division and will not be returned for any reason. The Purchasing Division will not accept bids, modification of bids, or addendum acknowledgment forms via e-mail. Acceptable delivery methods include electronic submission via wvOASIS, hand delivery, delivery by courier, or facsimile.

The bid delivery address is:
Department of Administration, Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130

A bid that is not submitted electronically through wvOASIS should contain the information listed below on the face of the envelope or the bid may be rejected by the Purchasing Division.:

SEALED BID: Rural volunteer management training curriculum development
BUYER: Dusty Smith
SOLICITATION NO.: CRFP DCH2000000003
BID OPENING DATE: April 8th, 2020
BID OPENING TIME: 1:30pm
FAX NUMBER: n/a

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The Purchasing Division may prohibit the submission of bids electronically through wvOASIS at its sole discretion. Such a prohibition will be contained and communicated in the wvOASIS system resulting in the Vendor's inability to submit bids through wvOASIS. Submission of a response to an Expression of Interest or Request for Proposal is not permitted in wvOASIS.

For Request For Proposal ("RFP") Responses Only: In the event that Vendor is responding to a request for proposal, the Vendor shall submit one original technical and one original cost proposal plus 4 _____ convenience copies of each to the Purchasing Division at the address shown above. Additionally, the Vendor should identify the bid type as either a technical or cost proposal on the face of each bid envelope submitted in response to a request for proposal as follows:

BID TYPE: (This only applies to CRFP)

Technical

Cost

7. BID OPENING: Bids submitted in response to this Solicitation will be opened at the location identified below on the date and time listed below. Delivery of a bid after the bid opening date and time will result in bid disqualification. For purposes of this Solicitation, a bid is considered delivered when confirmation of delivery is provided by wvOASIS (in the case of electronic submission) or when the bid is time stamped by the official Purchasing Division time clock (in the case of hand delivery).

Bid Opening Date and Time: April 8th, 2020 1:30pm

Bid Opening Location: Department of Administration, Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130

8. ADDENDUM ACKNOWLEDGEMENT: Changes or revisions to this Solicitation will be made by an official written addendum issued by the Purchasing Division. Vendor should acknowledge receipt of all addenda issued with this Solicitation by completing an Addendum Acknowledgment Form, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

9. BID FORMATTING: Vendor should type or electronically enter the information onto its bid to prevent errors in the evaluation. Failure to type or electronically enter the information may result in bid disqualification.

10. ALTERNATE MODEL OR BRAND: Unless the box below is checked, any model, brand, or specification listed in this Solicitation establishes the acceptable level of quality only and is not intended to reflect a preference for, or in any way favor, a particular brand or vendor. Vendors may bid alternates to a listed model or brand provided that the alternate is at least equal to the model or brand and complies with the required specifications. The equality of any alternate being bid shall be determined by the State at its sole discretion. Any Vendor bidding an alternate model or brand should clearly identify the alternate items in its bid and should include manufacturer's specifications, industry literature, and/or any other relevant documentation demonstrating the

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equality of the alternate items. Failure to provide information for alternate items may be grounds for rejection of a Vendor's bid.

This Solicitation is based upon a standardized commodity established under W. Va. Code § 5A-3-61. Vendors are expected to bid the standardized commodity identified. Failure to bid the standardized commodity will result in your firm's bid being rejected.

11. EXCEPTIONS AND CLARIFICATIONS: The Solicitation contains the specifications that shall form the basis of a contractual agreement. Vendor shall clearly mark any exceptions, clarifications, or other proposed modifications in its bid. Exceptions to, clarifications of, or modifications of a requirement or term and condition of the Solicitation may result in bid disqualification.

12. COMMUNICATION LIMITATIONS: In accordance with West Virginia Code of State Rules §148-1-6.6, communication with the State of West Virginia or any of its employees regarding this Solicitation during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited without prior Purchasing Division approval. Purchasing Division approval for such communication is implied for all agency delegated and exempt purchases.

13. REGISTRATION: Prior to Contract award, the apparent successful Vendor must be properly registered with the West Virginia Purchasing Division and must have paid the \$125 fee, if applicable.

14. UNIT PRICE: Unit prices shall prevail in cases of a discrepancy in the Vendor's bid.

15. PREFERENCE: Vendor Preference may be requested in purchases of motor vehicles or construction and maintenance equipment and machinery used in highway and other infrastructure projects. Any request for preference must be submitted in writing with the bid, must specifically identify the preference requested with reference to the applicable subsection of West Virginia Code § 5A-3-37, and must include with the bid any information necessary to evaluate and confirm the applicability of the requested preference. A request form to help facilitate the request can be found at:
<http://www.state.wv.us/admin/purchase/vrc/Venpref.pdf>.

15A. RECIPROCAL PREFERENCE: The State of West Virginia applies a reciprocal preference to all solicitations for commodities and printing in accordance with W. Va. Code § 5A-3-37(b). In effect, non-resident vendors receiving a preference in their home states, will see that same preference granted to West Virginia resident vendors bidding against them in West Virginia. Any request for reciprocal preference must include with the bid any information necessary to evaluate and confirm the applicability of the preference. A request form to help facilitate the request can be found at: <http://www.state.wv.us/admin/purchase/vrc/Venpref.pdf>.

16. SMALL, WOMEN-OWNED, OR MINORITY-OWNED BUSINESSES: For any solicitations publicly advertised for bid, in accordance with West Virginia Code §5A-3-37(a)(7) and W. Va. CSR § 148-22-9, any non-resident vendor certified as a small, women-owned, or minority-owned business under W. Va. CSR § 148-22-9 shall be provided the same preference made available to any resident vendor. Any non-resident small, women-owned, or

minority-owned business must identify itself as such in writing, must submit that writing to the Purchasing Division with its bid, and must be properly certified under W. Va. CSR § 148-22-9 prior to contract award to receive the preferences made available to resident vendors. Preference for a non-resident small, women-owned, or minority owned business shall be applied in accordance with W. Va. CSR § 148-22-9.

17. WAIVER OF MINOR IRREGULARITIES: The Director reserves the right to waive minor irregularities in bids or specifications in accordance with West Virginia Code of State Rules § 148-1-4.6.

18. ELECTRONIC FILE ACCESS RESTRICTIONS: Vendor must ensure that its submission in wvOASIS can be accessed and viewed by the Purchasing Division staff immediately upon bid opening. The Purchasing Division will consider any file that cannot be immediately accessed and viewed at the time of the bid opening (such as, encrypted files, password protected files, or incompatible files) to be blank or incomplete as context requires, and are therefore unacceptable. A vendor will not be permitted to unencrypt files, remove password protections, or resubmit documents after bid opening to make a file viewable if those documents are required with the bid. A Vendor may be required to provide document passwords or remove access restrictions to allow the Purchasing Division to print or electronically save documents provided that those documents are viewable by the Purchasing Division prior to obtaining the password or removing the access restriction.

19. NON-RESPONSIBLE: The Purchasing Division Director reserves the right to reject the bid of any vendor as Non-Responsible in accordance with W. Va. Code of State Rules § 148-1-5.3, when the Director determines that the vendor submitting the bid does not have the capability to fully perform, or lacks the integrity and reliability to assure good-faith performance.”

20. ACCEPTANCE/REJECTION: The State may accept or reject any bid in whole, or in part in accordance with W. Va. Code of State Rules § 148-1-4.5. and § 148-1-6.4.b.”

21. YOUR SUBMISSION IS A PUBLIC DOCUMENT: Vendor’s entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of West Virginia Code §§ 5A-3-1 et seq., 5-22-1 et seq., and 5G-1-1 et seq. and the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any bid, proposal, or other document to the Purchasing Division constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document. The Purchasing Division will disclose any document labeled “confidential,” “proprietary,” “trade secret,” “private,” or labeled with any other claim against public disclosure of the documents, to include any “trade secrets” as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.

22. INTERESTED PARTY DISCLOSURE: West Virginia Code § 6D-1-2 requires that the vendor submit to the Purchasing Division a disclosure of interested parties to the contract for all contracts with an actual or estimated value of at least \$1 Million. That disclosure must occur on the form prescribed and approved by the WV Ethics Commission prior to contract award. A copy of that form is included with this solicitation or can be obtained from the WV Ethics Commission. This requirement does not apply to publicly traded companies listed on a national or international stock exchange. A more detailed definition of interested parties can be obtained from the form referenced above.

23. WITH THE BID REQUIREMENTS: In instances where these specifications require documentation or other information with the bid, and a vendor fails to provide it with the bid, the Director of the Purchasing Division reserves the right to request those items after bid opening and prior to contract award pursuant to the authority to waive minor irregularities in bids or specifications under W. Va. CSR § 148-1-4.6. This authority does not apply to instances where state law mandates receipt with the bid.

REQUEST FOR PROPOSAL
Department of Arts Culture and History
Volunteer West Virginia
DCH2000000001

SECTION 3: GENERAL TERMS AND CONDITIONS

Terms and conditions begin on next page.

GENERAL TERMS AND CONDITIONS:

1. CONTRACTUAL AGREEMENT: Issuance of a Award Document signed by the Purchasing Division Director, or his designee, and approved as to form by the Attorney General's office constitutes acceptance of this Contract made by and between the State of West Virginia and the Vendor. Vendor's signature on its bid signifies Vendor's agreement to be bound by and accept the terms and conditions contained in this Contract.

2. DEFINITIONS: As used in this Solicitation/Contract, the following terms shall have the meanings attributed to them below. Additional definitions may be found in the specifications included with this Solicitation/Contract.

2.1. "Agency" or "Agencies" means the agency, board, commission, or other entity of the State of West Virginia that is identified on the first page of the Solicitation or any other public entity seeking to procure goods or services under this Contract.

2.2. "Bid" or "Proposal" means the vendors submitted response to this solicitation.

2.3. "Contract" means the binding agreement that is entered into between the State and the Vendor to provide the goods or services requested in the Solicitation.

2.4. "Director" means the Director of the West Virginia Department of Administration, Purchasing Division.

2.5. "Purchasing Division" means the West Virginia Department of Administration, Purchasing Division.

2.6. "Award Document" means the document signed by the Agency and the Purchasing Division, and approved as to form by the Attorney General, that identifies the Vendor as the contract holder.

2.7. "Solicitation" means the official notice of an opportunity to supply the State with goods or services that is published by the Purchasing Division.

2.8. "State" means the State of West Virginia and/or any of its agencies, commissions, boards, etc. as context requires.

2.9. "Vendor" or "Vendors" means any entity submitting a bid in response to the Solicitation, the entity that has been selected as the lowest responsible bidder, or the entity that has been awarded the Contract as context requires.

3. CONTRACT TERM; RENEWAL; EXTENSION: The term of this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below:

Term Contract

Initial Contract Term: This Contract becomes effective on UPON AWARD and extends for a period of one year(s).

Renewal Term: This Contract may be renewed upon the mutual written consent of the Agency, and the Vendor, with approval of the Purchasing Division and the Attorney General's office (Attorney General approval is as to form only). Any request for renewal should be delivered to the Agency and then submitted to the Purchasing Division thirty (30) days prior to the expiration date of the initial contract term or appropriate renewal term. A Contract renewal shall be in accordance with the terms and conditions of the original contract. Unless otherwise specified below, renewal of this Contract is limited to _____ successive one (1) year periods or multiple renewal periods of less than one year, provided that the multiple renewal periods do not exceed the total number of months available in all renewal years combined. Automatic renewal of this Contract is prohibited. Renewals must be approved by the Vendor, Agency, Purchasing Division and Attorney General's office (Attorney General approval is as to form only)

Alternate Renewal Term – This contract may be renewed for _____ successive _____ year periods or shorter periods provided that they do not exceed the total number of months contained in all available renewals. Automatic renewal of this Contract is prohibited. Renewals must be approved by the Vendor, Agency, Purchasing Division and Attorney General's office (Attorney General approval is as to form only)

Delivery Order Limitations: In the event that this contract permits delivery orders, a delivery order may only be issued during the time this Contract is in effect. Any delivery order issued within one year of the expiration of this Contract shall be effective for one year from the date the delivery order is issued. No delivery order may be extended beyond one year after this Contract has expired.

Fixed Period Contract: This Contract becomes effective upon Vendor's receipt of the notice to proceed and must be completed within _____ days.

Fixed Period Contract with Renewals: This Contract becomes effective upon Vendor's receipt of the notice to proceed and part of the Contract more fully described in the attached specifications must be completed within _____ days. Upon completion of the work covered by the preceding sentence, the vendor agrees that maintenance, monitoring, or warranty services will be provided for _____ year(s) thereafter.

One Time Purchase: The term of this Contract shall run from the issuance of the Award Document until all of the goods contracted for have been delivered, but in no event will this Contract extend for more than one fiscal year.

Other: See attached.

4. NOTICE TO PROCEED: Vendor shall begin performance of this Contract immediately upon receiving notice to proceed unless otherwise instructed by the Agency. Unless otherwise specified, the fully executed Award Document will be considered notice to proceed.

5. QUANTITIES: The quantities required under this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below.

Open End Contract: Quantities listed in this Solicitation are approximations only, based on estimates supplied by the Agency. It is understood and agreed that the Contract shall cover the quantities actually ordered for delivery during the term of the Contract, whether more or less than the quantities shown.

Service: The scope of the service to be provided will be more clearly defined in the specifications included herewith.

Combined Service and Goods: The scope of the service and deliverable goods to be provided will be more clearly defined in the specifications included herewith.

One Time Purchase: This Contract is for the purchase of a set quantity of goods that are identified in the specifications included herewith. Once those items have been delivered, no additional goods may be procured under this Contract without an appropriate change order approved by the Vendor, Agency, Purchasing Division, and Attorney General's office.

6. EMERGENCY PURCHASES: The Purchasing Division Director may authorize the Agency to purchase goods or services in the open market that Vendor would otherwise provide under this Contract if those goods or services are for immediate or expedited delivery in an emergency. Emergencies shall include, but are not limited to, delays in transportation or an unanticipated increase in the volume of work. An emergency purchase in the open market, approved by the Purchasing Division Director, shall not constitute a breach of this Contract and shall not entitle the Vendor to any form of compensation or damages. This provision does not excuse the State from fulfilling its obligations under a One Time Purchase contract.

7. REQUIRED DOCUMENTS: All of the items checked below must be provided to the Purchasing Division by the Vendor as specified below.

BID BOND (Construction Only): Pursuant to the requirements contained in W. Va. Code § 5-22-1(c), All Vendors submitting a bid on a construction project shall furnish a valid bid bond in the amount of five percent (5%) of the total amount of the bid protecting the State of West Virginia. The bid bond must be submitted with the bid.

PERFORMANCE BOND: The apparent successful Vendor shall provide a performance bond in the amount of 100% of the contract. The performance bond must be received by the Purchasing Division prior to Contract award.

LABOR/MATERIAL PAYMENT BOND: The apparent successful Vendor shall provide a labor/material payment bond in the amount of 100% of the Contract value. The labor/material payment bond must be delivered to the Purchasing Division prior to Contract award.

In lieu of the Bid Bond, Performance Bond, and Labor/Material Payment Bond, the Vendor may provide certified checks, cashier's checks, or irrevocable letters of credit. Any certified check, cashier's check, or irrevocable letter of credit provided in lieu of a bond must be of the same amount and delivered on the same schedule as the bond it replaces. A letter of credit submitted in lieu of a performance and labor/material payment bond will only be allowed for projects under \$100,000. Personal or business checks are not acceptable. Notwithstanding the foregoing, West Virginia Code § 5-22-1 (d) mandates that a vendor provide a performance and labor/material payment bond for construction projects. Accordingly, substitutions for the performance and labor/material payment bonds for construction projects is not permitted.

MAINTENANCE BOND: The apparent successful Vendor shall provide a two (2) year maintenance bond covering the roofing system. The maintenance bond must be issued and delivered to the Purchasing Division prior to Contract award.

LICENSE(S) / CERTIFICATIONS / PERMITS: In addition to anything required under the Section of the General Terms and Conditions entitled Licensing, the apparent successful Vendor shall furnish proof of the following licenses, certifications, and/or permits upon request and in a form acceptable to the State. The request may be prior to or after contract award at the State's sole discretion.

The apparent successful Vendor shall also furnish proof of any additional licenses or certifications contained in the specifications regardless of whether or not that requirement is listed above.

8. INSURANCE: The apparent successful Vendor shall furnish proof of the insurance identified by a checkmark below and must include the State as an additional insured on each policy prior to Contract award. The insurance coverages identified below must be maintained throughout the life of this contract. Thirty (30) days prior to the expiration of the insurance policies, Vendor shall provide the Agency with proof that the insurance mandated herein has been continued. Vendor must also provide Agency with immediate notice of any changes in its insurance policies, including but not limited to, policy cancelation, policy reduction, or change in insurers. The apparent successful Vendor shall also furnish proof of any additional insurance requirements contained in the specifications prior to Contract award regardless of whether or not that insurance requirement is listed in this section.

Vendor must maintain:

Commercial General Liability Insurance in at least an amount of: _____ per occurrence.

Automobile Liability Insurance in at least an amount of: \$1,000,000 per occurrence.

Professional/Malpractice/Errors and Omission Insurance in at least an amount of: \$1,000,000 per occurrence. Notwithstanding the forgoing, Vendor's are not required to list the State as an additional insured for this type of policy.

Commercial Crime and Third Party Fidelity Insurance in an amount of: _____ per occurrence.

Cyber Liability Insurance in an amount of: _____ per occurrence.

Builders Risk Insurance in an amount equal to 100% of the amount of the Contract.

Pollution Insurance in an amount of: _____ per occurrence.

Aircraft Liability in an amount of: _____ per occurrence.

Notwithstanding anything contained in this section to the contrary, the Director of the Purchasing Division reserves the right to waive the requirement that the State be named as an additional insured on one or more of the Vendor's insurance policies if the Director finds that doing so is in the State's best interest.

9. WORKERS' COMPENSATION INSURANCE: The apparent successful Vendor shall comply with laws relating to workers compensation, shall maintain workers' compensation insurance when required, and shall furnish proof of workers' compensation insurance upon request.

10. [Reserved]

11. LIQUIDATED DAMAGES: This clause shall in no way be considered exclusive and shall not limit the State or Agency's right to pursue any other available remedy. Vendor shall pay liquidated damages in the amount specified below or as described in the specifications:

n/a _____ for _____

Liquidated Damages Contained in the Specifications

12. ACCEPTANCE: Vendor's signature on its bid, or on the certification and signature page, constitutes an offer to the State that cannot be unilaterally withdrawn, signifies that the product or service proposed by vendor meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise indicated, and signifies acceptance of the terms and conditions contained in the Solicitation unless otherwise indicated.

13. PRICING: The pricing set forth herein is firm for the life of the Contract, unless specified elsewhere within this Solicitation/Contract by the State. A Vendor's inclusion of price adjustment provisions in its bid, without an express authorization from the State in the Solicitation to do so, may result in bid disqualification. Notwithstanding the foregoing, Vendor must extend any publicly advertised sale price to the State and invoice at the lower of the contract price or the publicly advertised sale price.

14. PAYMENT IN ARREARS: Payment in advance is prohibited under this Contract. Payment may only be made after the delivery and acceptance of goods or services. The Vendor shall submit invoices, in arrears.

15. PAYMENT METHODS: Vendor must accept payment by electronic funds transfer and P-Card. (The State of West Virginia's Purchasing Card program, administered under contract by a banking institution, processes payment for goods and services through state designated credit cards.)

16. TAXES: The Vendor shall pay any applicable sales, use, personal property or any other taxes arising out of this Contract and the transactions contemplated thereby. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.

17. ADDITIONAL FEES: Vendor is not permitted to charge additional fees or assess additional charges that were not either expressly provided for in the solicitation published by the State of West Virginia or included in the unit price or lump sum bid amount that Vendor is required by the solicitation to provide. Including such fees or charges as notes to the solicitation may result in rejection of vendor's bid. Requesting such fees or charges be paid after the contract has been awarded may result in cancellation of the contract.

18. FUNDING: This Contract shall continue for the term stated herein, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise made available, this Contract becomes void and of no effect beginning on July 1 of the fiscal year for which funding has not been appropriated or otherwise made available.

19. CANCELLATION: The Purchasing Division Director reserves the right to cancel this Contract immediately upon written notice to the vendor if the materials or workmanship supplied do not conform to the specifications contained in the Contract. The Purchasing Division Director may also cancel any purchase or Contract upon 30 days written notice to the Vendor in accordance with West Virginia Code of State Rules § 148-1-5.2.b.

20. TIME: Time is of the essence with regard to all matters of time and performance in this Contract.

21. APPLICABLE LAW: This Contract is governed by and interpreted under West Virginia law without giving effect to its choice of law principles. Any information provided in specification manuals, or any other source, verbal or written, which contradicts or violates the West Virginia Constitution, West Virginia Code or West Virginia Code of State Rules is void and of no effect.

22. COMPLIANCE WITH LAWS: Vendor shall comply with all applicable federal, state, and local laws, regulations and ordinances. By submitting a bid, Vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances.

SUBCONTRACTOR COMPLIANCE: Vendor shall notify all subcontractors providing commodities or services related to this Contract that as subcontractors, they too are required to comply with all applicable laws, regulations, and ordinances. Notification under this provision must occur prior to the performance of any work under the contract by the subcontractor.

23. ARBITRATION: Any references made to arbitration contained in this Contract, Vendor's bid, or in any American Institute of Architects documents pertaining to this Contract are hereby deleted, void, and of no effect.

24. MODIFICATIONS: This writing is the parties' final expression of intent. Notwithstanding anything contained in this Contract to the contrary no modification of this Contract shall be binding without mutual written consent of the Agency, and the Vendor, with approval of the Purchasing Division and the Attorney General's office (Attorney General approval is as to form only). Any change to existing contracts that adds work or changes contract cost, and were not included in the original contract, must be approved by the Purchasing Division and the Attorney General's Office (as to form) prior to the implementation of the change or commencement of work affected by the change.

25. WAIVER: The failure of either party to insist upon a strict performance of any of the terms or provision of this Contract, or to exercise any option, right, or remedy herein contained, shall not be construed as a waiver or a relinquishment for the future of such term, provision, option, right, or remedy, but the same shall continue in full force and effect. Any waiver must be expressly stated in writing and signed by the waiving party.

26. SUBSEQUENT FORMS: The terms and conditions contained in this Contract shall supersede any and all subsequent terms and conditions which may appear on any form documents submitted by Vendor to the Agency or Purchasing Division such as price lists, order forms, invoices, sales agreements, or maintenance agreements, and includes internet websites or other electronic documents. Acceptance or use of Vendor's forms does not constitute acceptance of the terms and conditions contained thereon.

27. ASSIGNMENT: Neither this Contract nor any monies due, or to become due hereunder, may be assigned by the Vendor without the express written consent of the Agency, the Purchasing Division, the Attorney General's office (as to form only), and any other government agency or office that may be required to approve such assignments.

28. WARRANTY: The Vendor expressly warrants that the goods and/or services covered by this Contract will: (a) conform to the specifications, drawings, samples, or other description furnished or specified by the Agency; (b) be merchantable and fit for the purpose intended; and (c) be free from defect in material and workmanship.

29. STATE EMPLOYEES: State employees are not permitted to utilize this Contract for personal use and the Vendor is prohibited from permitting or facilitating the same.

30. PRIVACY, SECURITY, AND CONFIDENTIALITY: The Vendor agrees that it will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the Agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the Agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/default.html>.

31. YOUR SUBMISSION IS A PUBLIC DOCUMENT: Vendor's entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of West Virginia Code §§ 5A-3-1 et seq., 5-22-1 et seq., and 5G-1-1 et seq. and the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any bid, proposal, or other document to the Purchasing Division constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document. The Purchasing Division will disclose any document labeled "confidential," "proprietary," "trade secret," "private," or labeled with any other claim against public disclosure of the documents, to include any "trade secrets" as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.

32. LICENSING: In accordance with West Virginia Code of State Rules § 148-1-6.1.e, Vendor must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agency or political subdivision. Obligations related to political subdivisions may include, but are not limited to, business licensing, business and occupation taxes, inspection compliance, permitting, etc. Upon request, the Vendor must provide all necessary releases to obtain information to enable the Purchasing Division Director or the Agency to verify that the Vendor is licensed and in good standing with the above entities.

SUBCONTRACTOR COMPLIANCE: Vendor shall notify all subcontractors providing commodities or services related to this Contract that as subcontractors, they too are required to be licensed, in good standing, and up-to-date on all state and local obligations as described in this section. Obligations related to political subdivisions may include, but are not limited to, business licensing, business and occupation taxes, inspection compliance, permitting, etc. Notification under this provision must occur prior to the performance of any work under the contract by the subcontractor.

33. ANTITRUST: In submitting a bid to, signing a contract with, or accepting a Award Document from any agency of the State of West Virginia, the Vendor agrees to convey, sell, assign, or transfer to the State of West Virginia all rights, title, and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to Vendor.

34. VENDOR CERTIFICATIONS: By signing its bid or entering into this Contract, Vendor certifies (1) that its bid or offer was made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, person or entity submitting a bid or offer for the same material, supplies, equipment or services; (2) that its bid or offer is in all respects fair and without collusion or fraud; (3) that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; and (4) that it has reviewed this Solicitation in its entirety; understands the requirements, terms and conditions, and other information contained herein.

Vendor's signature on its bid or offer also affirms that neither it nor its representatives have any interest, nor shall acquire any interest, direct or indirect, which would compromise the performance of its services hereunder. Any such interests shall be promptly presented in detail to the Agency. The individual signing this bid or offer on behalf of Vendor certifies that he or she is authorized by the Vendor to execute this bid or offer or any documents related thereto on Vendor's behalf; that he or she is authorized to bind the Vendor in a contractual relationship; and that, to the best of his or her knowledge, the Vendor has properly registered with any State agency that may require registration.

35. VENDOR RELATIONSHIP: The relationship of the Vendor to the State shall be that of an independent contractor and no principal-agent relationship or employer-employee relationship is contemplated or created by this Contract. The Vendor as an independent contractor is solely liable for the acts and omissions of its employees and agents. Vendor shall be responsible for selecting, supervising, and compensating any and all individuals employed pursuant to the terms of this Solicitation and resulting contract. Neither the Vendor, nor any employees or subcontractors of the Vendor, shall be deemed to be employees of the State for any purpose whatsoever. Vendor shall be exclusively responsible for payment of employees and contractors for all wages and salaries, taxes, withholding payments, penalties, fees, fringe benefits, professional liability insurance premiums, contributions to insurance and pension, or other deferred compensation plans, including but not limited to, Workers' Compensation and Social Security obligations, licensing fees, etc. and the filing of all necessary documents, forms, and returns pertinent to all of the foregoing.

Vendor shall hold harmless the State, and shall provide the State and Agency with a defense against any and all claims including, but not limited to, the foregoing payments, withholdings, contributions, taxes, Social Security taxes, and employer income tax returns.

36. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the State and the Agency, their officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage and hour laws.

37. PURCHASING AFFIDAVIT: In accordance with West Virginia Code §§ 5A-3-10a and 5-22-1(i), the State is prohibited from awarding a contract to any bidder that owes a debt to the State or a political subdivision of the State, Vendors are required to sign, notarize, and submit the Purchasing Affidavit to the Purchasing Division affirming under oath that it is not in default on any monetary obligation owed to the state or a political subdivision of the state.

38. ADDITIONAL AGENCY AND LOCAL GOVERNMENT USE: This Contract may be utilized by other agencies, spending units, and political subdivisions of the State of West Virginia; county, municipal, and other local government bodies; and school districts ("Other Government Entities"), provided that both the Other Government Entity and the Vendor agree. Any extension of this Contract to the aforementioned Other Government Entities must be on the same prices, terms, and conditions as those offered and agreed to in this Contract, provided that such extension is in compliance with the applicable laws, rules, and ordinances of the Other Government Entity. A refusal to extend this Contract to the Other Government Entities shall not impact or influence the award of this Contract in any manner.

39. CONFLICT OF INTEREST: Vendor, its officers or members or employees, shall not presently have or acquire an interest, direct or indirect, which would conflict with or compromise the performance of its obligations hereunder. Vendor shall periodically inquire of its officers, members and employees to ensure that a conflict of interest does not arise. Any conflict of interest discovered shall be promptly presented in detail to the Agency.

40. REPORTS: Vendor shall provide the Agency and/or the Purchasing Division with the following reports identified by a checked box below:

Such reports as the Agency and/or the Purchasing Division may request. Requested reports may include, but are not limited to, quantities purchased, agencies utilizing the contract, total contract expenditures by agency, etc.

Quarterly reports detailing the total quantity of purchases in units and dollars, along with a listing of purchases by agency. Quarterly reports should be delivered to the Purchasing Division via email at purchasing.requisitions@wv.gov.

41. BACKGROUND CHECK: In accordance with W. Va. Code § 15-2D-3, the Director of the Division of Protective Services shall require any service provider whose employees are regularly employed on the grounds or in the buildings of the Capitol complex or who have access to sensitive or critical information to submit to a fingerprint-based state and federal background inquiry through the state repository. The service provider is responsible for any costs associated with the fingerprint-based state and federal background inquiry.

After the contract for such services has been approved, but before any such employees are permitted to be on the grounds or in the buildings of the Capitol complex or have access to sensitive or critical information, the service provider shall submit a list of all persons who will be physically present and working at the Capitol complex to the Director of the Division of Protective Services for purposes of verifying compliance with this provision. The State reserves the right to prohibit a service provider's employees from accessing sensitive or critical information or to be present at the Capitol complex based upon results addressed from a criminal background check.

Revised 01/09/2020

Service providers should contact the West Virginia Division of Protective Services by phone at (304) 558-9911 for more information.

42. PREFERENCE FOR USE OF DOMESTIC STEEL PRODUCTS: Except when authorized by the Director of the Purchasing Division pursuant to W. Va. Code § 5A-3-56, no contractor may use or supply steel products for a State Contract Project other than those steel products made in the United States. A contractor who uses steel products in violation of this section may be subject to civil penalties pursuant to W. Va. Code § 5A-3-56. As used in this section:

- a. "State Contract Project" means any erection or construction of, or any addition to, alteration of or other improvement to any building or structure, including, but not limited to, roads or highways, or the installation of any heating or cooling or ventilating plants or other equipment, or the supply of and materials for such projects, pursuant to a contract with the State of West Virginia for which bids were solicited on or after June 6, 2001.
- b. "Steel Products" means products rolled, formed, shaped, drawn, extruded, forged, cast, fabricated or otherwise similarly processed, or processed by a combination of two or more or such operations, from steel made by the open heath, basic oxygen, electric furnace, Bessemer or other steel making process. The Purchasing Division Director may, in writing, authorize the use of foreign steel products if:
- c. The cost for each contract item used does not exceed one tenth of one percent (.1%) of the total contract cost or two thousand five hundred dollars (\$2,500.00), whichever is greater. For the purposes of this section, the cost is the value of the steel product as delivered to the project; or
- d. The Director of the Purchasing Division determines that specified steel materials are not produced in the United States in sufficient quantity or otherwise are not reasonably available to meet contract requirements.

43. PREFERENCE FOR USE OF DOMESTIC ALUMINUM, GLASS, AND STEEL: In Accordance with W. Va. Code § 5-19-1 et seq., and W. Va. CSR § 148-10-1 et seq., for every contract or subcontract, subject to the limitations contained herein, for the construction, reconstruction, alteration, repair, improvement or maintenance of public works or for the purchase of any item of machinery or equipment to be used at sites of public works, only domestic aluminum, glass or steel products shall be supplied unless the spending officer determines, in writing, after the receipt of offers or bids, (1) that the cost of domestic aluminum, glass or steel products is unreasonable or inconsistent with the public interest of the State of West Virginia, (2) that domestic aluminum, glass or steel products are not produced in sufficient quantities to meet the contract requirements, or (3) the available domestic aluminum, glass, or steel do not meet the contract specifications. This provision only applies to public works contracts awarded in an amount more than fifty thousand dollars (\$50,000) or public works contracts that require more than ten thousand pounds of steel products.

The cost of domestic aluminum, glass, or steel products may be unreasonable if the cost is more than twenty percent (20%) of the bid or offered price for foreign made aluminum, glass, or steel products. If the domestic aluminum, glass or steel products to be supplied or produced in a

“substantial labor surplus area”, as defined by the United States Department of Labor, the cost of domestic aluminum, glass, or steel products may be unreasonable if the cost is more than thirty percent (30%) of the bid or offered price for foreign made aluminum, glass, or steel products. This preference shall be applied to an item of machinery or equipment, as indicated above, when the item is a single unit of equipment or machinery manufactured primarily of aluminum, glass or steel, is part of a public works contract and has the sole purpose or of being a permanent part of a single public works project. This provision does not apply to equipment or machinery purchased by a spending unit for use by that spending unit and not as part of a single public works project.

All bids and offers including domestic aluminum, glass or steel products that exceed bid or offer prices including foreign aluminum, glass or steel products after application of the preferences provided in this provision may be reduced to a price equal to or lower than the lowest bid or offer price for foreign aluminum, glass or steel products plus the applicable preference. If the reduced bid or offer prices are made in writing and supersede the prior bid or offer prices, all bids or offers, including the reduced bid or offer prices, will be reevaluated in accordance with this rule.

44. INTERESTED PARTY SUPPLEMENTAL DISCLOSURE: W. Va. Code § 6D-1-2 requires that for contracts with an actual or estimated value of at least \$1 million, the vendor must submit to the Agency a supplemental disclosure of interested parties reflecting any new or differing interested parties to the contract, which were not included in the original pre-award interested party disclosure, within 30 days following the completion or termination of the contract. A copy of that form is included with this solicitation or can be obtained from the WV Ethics Commission. This requirement does not apply to publicly traded companies listed on a national or international stock exchange. A more detailed definition of interested parties can be obtained from the form referenced above.

45. PROHIBITION AGAINST USED OR REFURBISHED: Unless expressly permitted in the solicitation published by the State, Vendor must provide new, unused commodities, and is prohibited from supplying used or refurbished commodities, in fulfilling its responsibilities under this Contract.

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

Tobi Johnson, President

(Name, Title)

TOBI JOHNSON, PRESIDENT

(Printed Name and Title)

10300 EVELINE RIDGE LN, KNOXVILLE, TN 37922

(Address)

206-799-9038 / 865-675-7658

(Phone Number) / (Fax Number)

tobi@volpro.net

(email address)

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

TOBI JOHNSON & ASSOCIATES, LLC

(Company)

Tobi Johnson, President

(Authorized Signature) (Representative Name, Title)

TOBI JOHNSON, PRESIDENT

(Printed Name and Title of Authorized Representative)

5/14/20

(Date)

206-799-9038 / 865-675-7658

(Phone Number) (Fax Number)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.:

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input checked="" type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input checked="" type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input checked="" type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

TOBI JOHNSON & ASSOCIATES LLC
Company


Authorized Signature

5/14/20
Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

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SECTION 4: PROJECT SPECIFICATIONS

4.1. Background and Current Operating Environment: Founded in 1994 by Executive Order of Governor Caperton, Volunteer West Virginia is the state's lead in service and volunteerism. Our office is a small staff of 8 employees operating from an office on Capitol Street in downtown Charleston. Our work is primarily funded by the federal Corporation for National and Community Service. The activities described in this RFP are funded with a federal grant designed to improve volunteer management in rural areas. More information about our impact is available at www.volunteerwv.org.

4.2. Project Goals and Mandatory Requirements: There is no existing volunteer management curriculum that sufficiently pairs traditional and modern tools and addresses the specific challenges faced by rural communities seeking to mobilize volunteers. The successful vendor will work collaboratively with agency staff and advisory panel to develop a volunteer management curriculum that meets this need.

Vendor should describe its approach and methodology to providing the service or solving the problem described by meet the goals/objectives identified below. Vendor's response should include any information about how the proposed approach is superior or inferior to other possible approaches.

4.2.1. Goals and Objectives – The project goals and objectives are listed below. Vendor should:

4.2.1.1 Develop, test and revise a 3-hour Rural Volunteer Management Core Curriculum that addresses the challenges faced by rural communities and uses best practices in volunteer recruitment, retention, recognition and screening.

4.2.1.2 Develop, test and revise a companion train-the-trainer course curriculum inclusive of the core curriculum and four additional modules.

4.2.1.3 Create four additional 90-minute stand-alone learning modules for the purpose of professional development for volunteer managers. Topics might include: Developing your Board of Directors; How to be ready for group projects and service days; New approaches to volunteerism; Intergenerational Volunteering; Legal Issues and Liability Concerns; Strengthening Internal Operations to better support volunteers.

4.2.1.4 Develop an online resource library that includes templates, tools and links with appropriate guidance and tutorials to support the work of volunteer managers in rural communities.

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4.2.2. Mandatory Project Requirements – The Agency has decided not to include Mandatory Project Requirements. All proposal will be scored based on the Evaluation Criteria in Section 6.2.

4.3. Qualifications and Experience: Vendor should provide information and documentation regarding its qualifications and experience in providing services or solving problems similar to those requested in this RFP. Information and documentation should include, but is not limited to, copies of any staff certifications or degrees applicable to this project, proposed staffing plans, descriptions of past projects completed (descriptions should include the location of the project, project manager name and contact information, type of project, and what the project goals and objectives where and how they were met.), references for prior projects, and any other information that vendor deems relevant to the items identified as desirable or mandatory below.

4.3.1. Qualification and Experience Information: Vendor should describe in its proposal how it meets the desirable qualification and experience requirements listed below.

4.3.1.1. Vendor should have 5-10 years experience working in the field of volunteerism and nonprofits in rural communities.

4.3.1.2. Vendor should demonstrate expertise in volunteer management best practices.

4.3.1.3. Vendor should have a proven record of developing training curricula for adults inclusive of all learning styles.

4.3.1.4. Vendor should be skilled in providing training for adults in an engaging and varied format.

4.3.1.5. Vendor should provide a list of staff that will be assigned to this project including their qualifications, abilities and experience.

4.3.2. Mandatory Qualification/Experience Requirements – The following mandatory qualification/experience requirements must be met by the Vendor as a part of its submitted proposal. Vendor should describe how it meets the mandatory requirements and include any areas where it exceeds the mandatory requirements. Failure to comply with mandatory requirements will lead to disqualification, but areas where the mandatory requirements are exceeded will be included in technical scores where appropriate. The mandatory qualifications/experience requirements are listed below.

4.3.2.1. Vendor must have experience working in the field of volunteerism and nonprofits in rural communities.

4.3.2.2. Vendor must have a proven record of developing effective training curricula.

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SECTION 5: VENDOR PROPOSAL

- 5.1. Economy of Preparation:** Proposals should be prepared simply and economically providing a concise description of the items requested in Section 4. Emphasis should be placed on completeness and clarity of the content.
- 5.2. Incurring Cost:** Neither the State nor any of its employees or officers shall be held liable for any expenses incurred by any Vendor responding to this RFP, including but not limited to preparation, delivery, or travel.
- 5.3. Proposal Format:** Vendors should provide responses in the format listed below:
- 5.3.1. Two-Part Submission:** Vendors must submit proposals in two distinct parts: technical and cost. Technical proposals must not contain any cost information relating to the project. Cost proposal must contain all cost information and must be sealed in a separate envelope from the technical proposal to facilitate a secondary cost proposal opening.
 - 5.3.2. Title Page:** State the RFP subject, number, Vendor's name, business address, telephone number, fax number, name of contact person, e-mail address, and Vendor signature and date.
 - 5.3.3. Table of Contents:** Clearly identify the material by section and page number.
 - 5.3.4. Response Reference:** Vendor's response should clearly reference how the information provided applies to the RFP request. For example, listing the RFP number and restating the RFP request as a header in the proposal would be considered a clear reference.
 - 5.3.5. Proposal Submission:** All proposals must be submitted to the Purchasing Division prior to the date and time stipulated in the RFP as the opening date. All submissions must be in accordance with the provisions listed in Section 2: Instructions to Bidders Submitting Bids.

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SECTION 6: EVALUATION AND AWARD

- 6.1. Evaluation Process:** Proposals will be evaluated in two parts by a committee of three (3) or more individuals. The first evaluation will be of the technical proposal and the second is an evaluation of the cost proposal. The Vendor who demonstrates that it meets all of the mandatory specifications required, attains the minimum acceptable score and attains the highest overall point score of all Vendors shall be awarded the contract.
- 6.2. Evaluation Criteria:** Proposals will be evaluated based on criteria set forth in the solicitation and information contained in the proposals submitted in response to the solicitation. The technical evaluation will be based upon the point allocations designated below for a total of 70 of the 100 points. Cost represents 30 of the 100 total points.

Evaluation Point Allocation:

Project Goals and Proposed Approach (§ 4.2)

- **Approach & Methodology to Goals/Objectives (§ 4.2.1) 40 Points Possible**

Qualifications and experience (§ 4.3)

- **Qualifications and Experience (§ 4.3.1) 25 Points Possible**
- **Exceeding Mandatory Qualification/Experience Requirements (§ 4.3.2) 5 Points Possible**

Total Technical Score: 70 Points Possible

Total Cost Score: 30 Points Possible

Total Proposal Score: 100 Points Possible

Price of Proposal being evaluated

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- 6.3. Technical Bid Opening:** At the technical bid opening, the Purchasing Division will open and announce the technical proposals received prior to the bid opening deadline. Once opened, the technical proposals will be provided to the Agency evaluation committee for technical evaluation.
- 6.4. Technical Evaluation:** The Agency evaluation committee will review the technical proposals, assign points where appropriate, and make a final written recommendation to the Purchasing Division.
- 6.5. Proposal Disqualification:**
- 6.5.1. Minimum Acceptable Score (“MAS”):** Vendors must score a minimum of 70% (49 points) of the total technical points possible in order to move past the technical evaluation and have their cost proposal evaluated. All vendor proposals not attaining the MAS will be disqualified.
- 6.5.2. Failure to Meet Mandatory Requirement:** Vendors must meet or exceed all mandatory requirements in order to move past the technical evaluation and have their cost proposals evaluated. Proposals failing to meet one or more mandatory requirements of the RFP will be disqualified.
- 6.6. Cost Bid Opening:** The Purchasing Division will schedule a date and time to publicly open and announce cost proposals after technical evaluation has been completed and the Purchasing Division has approved the technical recommendation of the evaluation committee. All cost bids received will be opened. Cost bids for disqualified proposals will be opened for record keeping purposes only and will not be evaluated or considered. Once opened, the cost proposals will be provided to the Agency evaluation committee for cost evaluation.

The Purchasing Division reserves the right to disqualify a proposal based upon deficiencies in the technical proposal even after the cost evaluation.

- 6.7. Cost Evaluation:** The Agency evaluation committee will review the cost proposals, assign points in accordance with the cost evaluation formula contained herein and make a final recommendation to the Purchasing Division.

Cost Evaluation Formula: Each cost proposal will have points assigned using the following formula for all Vendors not disqualified during the technical evaluation. The lowest cost of all proposals is divided by the cost of the proposal being evaluated to generate a cost score percentage. That percentage is then multiplied by the points attributable to the cost proposal to determine the number of points allocated to the cost proposal being evaluated.

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Step 1: Lowest Cost of All Proposals / Cost of Proposal Being Evaluated = Cost Score Percentage

Step 2: Cost Score Percentage X Points Allocated to Cost Proposal = Total Cost Score

Example:

Proposal 1 Cost is \$1,000,000

Proposal 2 Cost is \$1,100,000

Points Allocated to Cost Proposal is 30

Proposal 1: Step 1 – $\$1,000,000 / \$1,000,000 =$ Cost Score Percentage of 1 (100%)
Step 2 – $1 \times 30 =$ Total Cost Score of 30

Proposal 2: Step 1 – $\$1,000,000 / \$1,100,000 =$ Cost Score Percentage of 0.909091 (90.9091%)
Step 2 – $0.909091 \times 30 =$ Total Cost Score of 27.27273

6.8. Availability of Information: Proposal submissions become public and are available for review immediately after opening pursuant to West Virginia Code §5A-3-11(h). All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded pursuant to West Virginia Code of State Rules §148-1-6.3. d.

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that, to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

TOBI JOHNSON & ASSOCIATES LLC
(Company)

TOBI JOHNSON, PRESIDENT
(Representative Name, Title)

206-799-9038 / 865-675-7658
(Contact Phone/Fax Number)

5/14/20
(Date)