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General Information

Contact

Default Values

Discount

Document Information

Procurement Folder: 637020

SO Doc Code: CRFQ

Procurement Type: Central Contract - Fixed Amt

SO Dept: 0907

Vendor ID: VS0000019670



SO Doc ID: RNB2000000001

Legal Name: BIRCHWOOD SOLUTIONS LLC

Published Date: 11/1/19

Alias/DBA: ELIZABETH S TEMPLE

Close Date: 11/15/19

Total Bid: \$863,856.00

Close Time: 13:30

Response Date: 11/13/2019



Status: Closed

Response Time: 11:44

Solicitation Description: WV RESTORE -REFERRAL,
TREATMENT & MONITORING


Total of Header Attachments: 5

Total of All Attachments: 5



Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Solicitation Response

Proc Folder : 637020

Solicitation Description : WV RESTORE -REFERRAL, TREATMENT & MONITORING MANAGEMENT

Proc Type : Central Contract - Fixed Amt

Date issued	Solicitation Closes	Solicitation Response	Version
	2019-11-15 13:30:00	SR 0907 ESR11131900000002980	1

VENDOR

VS0000019670

BIRCHWOOD SOLUTIONS LLC

ELIZABETH S TEMPLE

Solicitation Number: CRFQ 0907 RNB2000000001

Total Bid : \$863,856.00 Response Date: 2019-11-13 Response Time: 11:44:50

Comments: Please see attached Letter of Transmission for overall response comment.

FOR INFORMATION CONTACT THE BUYER

Jessica S Chambers
(304) 558-0246
jessica.s.chambers@wv.gov

Signature on File

FEIN #

DATE

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Monthly Cost for Healthcare providers specialists services	12.00000	MO	\$17,997.000000	\$215,964.00

Comm Code	Manufacturer	Specification	Model #
85121700			

Extended Description : Vendor should insert their monthly cost for year one of contract services.

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Year Two Monthly Cost for Healthcare Services	12.00000	MO	\$17,997.000000	\$215,964.00

Comm Code	Manufacturer	Specification	Model #
85121700			

Extended Description : Vendor should insert Option Year #2 monthly cost for services.

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Year Three Monthly Cost for Healthcare Services	12.00000	MO	\$17,997.000000	\$215,964.00

Comm Code	Manufacturer	Specification	Model #
85121700			

Extended Description : Vendor should insert Option Year #3 monthly cost for services.

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Year Four Monthly Cost for Healthcare Services	12.00000	MO	\$17,997.000000	\$215,964.00

Comm Code	Manufacturer	Specification	Model #
85121700			

Extended Description : Vendor should insert Option Year #3 monthly cost for services.

November 11, 2019



Bid Clerk
Department of Administration
Purchasing Division
2019 Washington St E
Charleston, WV 25305

SUBJECT: Letter of Transmission for Solution No. CRFQ 0907 RNB2000000001
WV RESTORE – Referral, Treatment, & Monitoring Management

PURPOSE: Birchwood Solutions, LLC is responding to the West Virginia Purchasing Division bid solicitation for the subject referenced above. It is the intent of Birchwood Solutions to respond under the qualifications outlined in the RFQ and under the designation of a Small, Women-Owned Business West Virginia Code §5A-3-59

BACKGROUND: In July 2012, West Virginia RESTORE was designated for the WV Nurse Health Program whose purpose is to protect the public by providing a monitoring and recovery program for registered professional nurses with a substance use disorder or a qualifying mental health condition. WV RESTORE has historically been managed and operated under non-nursing focused providers (West Virginia Pharmacist Recovery Network).

Birchwood Solutions' history is working with state licensing boards and their monitoring programs for registered professional nurses with a substance use disorder or a qualifying mental health condition. Our program will allocate 100% of its resources to the nurses of West Virginia with a staff combined experience of over 30 years. (Section 3. Qualifications)

Birchwood remains committed to and supports professional associations that promote best practices within the healthcare monitoring and assistance program field by active participation to include membership, presenter role, and professional development. The organizations include, but may not be limited to, the National Organization of Alternative Programs (NOAP), and the International Nurses Society on Addiction (IntNSA). In addition, Birchwood supports adhering to the National Council of State Boards of Nursing Guidelines for Substance Use Disorder in Nursing.

GUIDING PRINCIPLES: Birchwood Solutions' guiding principles in establishing and maintaining a collaborative partnership with the West Virginia Board of Nursing are as follows:

1. The interests of the WV Board of Nursing and Birchwood Solutions will be furthered by this collaboration.
2. Monitoring and educational opportunities will be enhanced for all participants, employers, & workplace monitors.
3. The relationship sought is one of true collaboration where investment and value are recognized bilaterally both financially and with the overall enhancement of RESTORE services benefiting the Board, their participants, employers, and the citizens of West Virginia.
4. Both the WV Board of Nursing and Birchwood are interested in generating results to further each other's respective missions.

We acknowledge and accept all the terms as outlined in the above referenced RFQ and attached supporting documents.

Respectfully Submitted,

A handwritten signature in blue ink, appearing to read "Elizabeth Temple", is written over a horizontal line.

Elizabeth Temple, M.Ed.
President

November 11, 2019



Bid Clerk
Department of Administration
Purchasing Division
2019 Washington St E
Charleston, WV 25305

SUBJECT: Conflict Disclosure for Solution No. CRFQ 0907 RNB2000000001
WV RESTORE – Referral, Treatment, & Monitoring Management

It is required by section 4.1.2.5 of the above-referenced RFQ that the vendor disclose in writing any conflicts of interest that vendor has in a facility, service, or laboratory to which a participant is referred. Birchwood Solutions is submitting in writing with the bid that no such conflict is known to exist. Should a conflict arise during any point of the contract, Birchwood will disclose to the agency immediately.

Respectfully Submitted,

A handwritten signature in blue ink, appearing to read "Elizabeth Temple".

Elizabeth Temple, M.Ed.
President

Section	Requirement	Response
Purpose & Scope	<p>The West Virginia Purchasing Division is soliciting bids on behalf of West Virginia Board of Examiners for Registered Professional Nurses (Agency) to establish a contract for the Referral, Treatment and Monitoring segment of the program is to encourage voluntary participation in monitoring alcohol, chemical dependence or significant mental health conditions. The WVR program provides ongoing support to approximately 140 participants per year.</p> <p>This support will consist of a formal written agreement outlining the requirements for participation of a licensee or applicant in WVR. The agreement shall include a mutually agreed upon treatment and rehabilitation program, mandatory conditions which must be met as well as procedures to monitor compliance with their program of recovery. Public speaking face-to-face education and outreach shall be approved by the Agency Executive Director, but should be limited, as the main purpose of this segment of WVR is the monitoring of its participants.</p>	<p>Birchwood Solutions recognizes that the West VA Purchasing Division is soliciting bids on behalf of West VA Board of Examiners for Registered Professional Nurses (Agency) to establish a contract for the Referral, Treatment and Monitoring segment of the program is to encourage voluntary participation in monitoring alcohol, chemical dependence or significant mental health conditions. The WVR program provides ongoing support to approximately 140 participants per year.</p> <p>Birchwood Solutions understands this support will consist of a formal written agreement outlining the requirements for participation of a licensee or applicant in WVR. The agreement shall include a mutually agreed upon treatment and rehabilitation program, mandatory conditions which must be met as well as procedures to monitor compliance with their program of recovery. Public speaking face-to-face education and outreach shall be approved by the Agency Executive Director, but should be limited, as the main purpose of this segment of WVR is the monitoring of its participants.</p>
3. Qualifications (letter of transmission has additions information)	<p>Vendor, or Vendor's staff if requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum qualifications.</p> <p>Vendor must provide any documentation requested by the State to assist in confirmation of compliance with this provision. References, documentation, or other information to confirm compliance with this experience requirement may be requested.</p>	<p>Birchwood Solutions understands that the Vendor, or Vendor's staff if requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum qualifications.</p> <p>Vendor must provide any documentation requested by the State to assist in confirmation of compliance with this provision. References, documentation, or other information to confirm compliance with this experience requirement may be requested.</p>
3.1	<p>Previous experience operating a program similar to this program in monitoring addiction, alcohol, chemical dependency, major mental health condition and case management.</p>	<p>Birchwood Solutions acknowledges that previous experience operating a program similar to this program in monitoring addiction, alcohol, chemical dependency, major mental health condition and case management is preferred.</p>

	3.2	Case manager(s) must be a Registered Professional Nurse in the State of West Virginia with an active unencumbered license with five years of experience working in monitoring and recovery program case management for nurses. The vendor may be required to provide documentation verifying compliance with this section of the contract. The ratio of case managers to participants shall not exceed the 100 participants to 1 case manager. There shall be a minimum of 1 full time case manager throughout the contract. It is preferred the case manager be certified in addiction nursing (CARN) and/or case management.	Birchwood Solutions understands and accepts the following recommendations that <ul style="list-style-type: none"> • Case Manager(s) must be a Registered Professional Nurse in the State of West Virginia with an active unencumbered license with five years of experience working in monitoring and recovery program case management for nurses; and • The vendor may be required to provide documentation verifying compliance with this section of the contract; and • The ratio of case managers to participants shall not exceed the 100 participants to 1 case manager; and • There shall be a minimum of 1 full time case manager throughout the contract; and • It is preferred the case manager be certified in addiction nursing (CARN) and/or case management.
	3.2	Employ or contract for services of a certified Medical Review Officer (MRO) by the Medical Review Officer Certification Council. The MRO must be certified by the American Society of Addiction Medicine.	Birchwood Solutions will employ or contract for services of a certified Medical Review Officer (MRO) by the Medical Review Officer Certification Council and that the MRO must be certified by the American Society of Addiction Medicine. However, RESTORE's current third-party vendor provides the services of an MRO that meets the stated qualifications without a charge.
4. Mandatory Requirements:			
	4.1	Mandatory Contract Services Requirements and Deliverables: Contract Services must meet or exceed the mandatory requirements listed below:	Birchwood Solutions has reviewed all the mandatory requirements and agrees to comply with each and every one.
4.1.1 Case Management			

4.1.1.1	<p>The Vendor must be able to accommodate the participant's needs, confidentiality, and meeting space. Additionally, the vendor must provide modification for a participant who cannot travel to the Vendor due to hardship (for example, vendor travel to the area of the participant).</p> <p>The Vendor services shall be open Monday through Friday from 8 am – 4:30 pm EST and follow the same holiday schedule as the State of West Virginia. Additionally, the Vendor shall be available upon special request by a participant or the Agency by appointment.</p>	<p>Birchwood Solutions provide office space that will accommodate participant needs, confidentiality, and meeting space.</p> <p>In hardship situations, Birchwood Solution's staff will travel to the area of the participant; video conferencing is also an option when appropriate.</p> <p>Birchwood Solutions shall be open M-F from 8 am-4:30 EST and follow the same holiday schedule as the State of WV.</p> <p>Birchwood Solutions shall have staff available upon special request by a participant or the Agency by appointment.</p>
4.1.1.2	<p>The vendor shall answer any calls into WVR after the hours of operation, on weekends, and all holidays. There shall be a mutually agreed upon triage list for WVR to respond immediately approved by the Agency.</p>	<p>Birchwood Solution staff will be available to answer calls into WVR after the hours of operation, on weekends and all holidays.</p> <p>Birchwood Solution supports a mutually agreed upon triage list for WVR with the Agency to facilitate an immediately response.</p>
4.1.1.3	<p>Collaborate with the selected vendor of the facilitated peer support groups to exchange appropriate data related to participant compliance with their RMA.</p>	<p>Birchwood Solutions agrees to collaborate with the vendor of the facilitated peer support groups and to exchange appropriate data related to participant compliance with their RMA.</p>
4.1.1.4	<p>Adequate support services must be provided to meet the program needs. Support staff should have excellent communication and technical skills.</p>	<p>Birchwood Solutions will provide adequate support staff to meet the program needs. Support staff will have excellent communication and technical skills.</p>
4.1.1.5	<p>Operate, maintain and update the WV Restore website 24 hours per day and seven days a week. All content shall be approved by the Agency, and the Agency retains all intellectual property rights to the website. The Vendor is required to surrender to any passwords or other access information necessary to transfer control of the website to another Vendor if requested.</p>	<p>Birchwood Solutions will operate, maintain and update the WV Restore website 24 hours and seven days a week. Birchwood Solutions will obtain the approval from the Agency before positing content. Birchwood Solutions understands that control of the website to another Vendor if the Agency requests Birchwood Solutions to do so as well as any passwords or other access information.</p>
4.1.2 Toxicology Testing and Reporting		

4.1.2.1	Contract with a third party to conduct random toxicology testing on program participants and provide test reporting as described below. All testing and reporting must meet the standards for a multistate research group through the National Organization of Alternative Programs. Costs of the drug screens are the responsibility of the participant.	Birchwood Solutions understands that RESTORE contracts with a third party to conduct random toxicology testing on program participants and provide test reporting as described below. <ul style="list-style-type: none"> • All testing and reporting must meet the standards for a multistate research group through the National Organization of Alternative Programs. <ul style="list-style-type: none"> • Birchwood Solutions is familiar with NOAP's standards for the multistate research group and the importance of the data collection for the NCSBN's current research project. • Birchwood understands that the cost of the drug screens is the responsibility of the participant. • Birchwood Solutions would also support the utilization of the NCSBN toxicology screening guidelines for monitoring programs.
4.1.2.2	Ensure that all screening laboratories utilized for drug testing shall have policies and procedures for the chain of custody and shall provide results directly to the WVR.	The current WVR third-party vendor providing drug screen services accommodates the needs of each individual monitoring program, including utilizing chain-of-custody and providing results directly to the WVR. The CSR communicates with the monitoring program case managers regularly as well as the MRO and senior management are always available to assist when the need arises.
4.1.2.3	A program for screening must include facilities at locations throughout the state of West Virginia.	Birchwood Solutions agrees that a program for screening must include facilities at locations throughout the state of West Virginia.
4.1.2.4	Require the laboratory vendor (or third-party administrator of laboratory services) to provide the capability of obtaining a witnessed urine specimen. Appropriate policies and procedures shall be in place to accomplish this objective and determine which participants shall have observed screens. The confirmation test for a specimen initially testing positive for a prohibited substance is confirmed by either gas or liquid chromatography in conjunction with mass spectrometry (gg/ms or lc/ms.). The vendor/services are compliant with program requirements and report to the Agency annually. If the laboratory vendor/services are not compliant a correction plan shall be required and reported to the Agency within 15 days.	Birchwood Solutions shall require the laboratory vendor (or third-party administrator of laboratory services) to provide the capability of obtaining a witnessed urine specimen. Appropriate policies and procedures shall be in place to accomplish this objective and determine which participants shall have observed screens. The confirmation test for a specimen initially testing positive for a prohibited substance is confirmed by either gas or liquid chromatography in conjunction with mass spectrometry (gg/ms or lc/ms.). The vendor/services are compliant with program requirements and report to the Agency annually. If the laboratory vendor/services are not compliant a correction plan shall be required and reported to the Agency within 15 days.

4.1.2.5	Disclose in writing to the Agency with the bid and anytime during the contract, any interest the selected vendor has in a facility, service, or laboratory to which a participant is referred, which would be a conflict of interest.	Birchwood Solutions is ready to disclose in writing to the Agency with the bid and anytime during the contract, any interest the selected vendor has in a facility, service, or laboratory to which a participant is referred, which would be a conflict of interest. At this time, there are no known conflicts of interest.
4.1.2.6	Ensure that the panel of substances to be tested for in each participant's UDS must include each participant's "drug(s) of choice," meaning any substance or substances which the participant is known to have been habitually ingesting.	<ul style="list-style-type: none"> • Birchwood understands that the panel of substances to be tested for in each participant's UDS must include each participant's "drug(s) of choice," meaning any substance or substances which the participant is known to have been habitually ingesting. • Birchwood supports this philosophy of drug testing, keeping in mind that a relapse may not be the drug of choice and panels should be random and diverse.
4.1.2.7	Utilize the current electronic database (Affinity eHealth) to capture and provide immediate access to secure communication with WV Restore nurse participants, in addition to on-line "real-time" reporting by the nurse participant's worksite supervisor and Nurse Support Group Vendor.	<ul style="list-style-type: none"> • Birchwood Solutions will utilize the current electronic database (Affinity eHealth) or its successor to capture and provide immediate access to secure communication with WV Restore nurse participants, in addition to on-line "real-time" reporting by the nurse participant's worksite supervisor and Nurse Support Group Vendor. • Birchwood Solutions staff has extensive experience utilizing Affinity eHealth's case management system.

4.1.3 Vendor Reporting Requirements for Involuntary Referral Participants	<ul style="list-style-type: none"> • All positive or dilute UDS submitted as well as all missed drug screens to Agency within 72 hours of being notified of the MRO validated drug screen results, a dilute specimen provided by the impaired practitioner, or a missed UDS. • All missed or incorrectly submitted work site or self-reports to the Agency within 15 days of the missed report deadline. • Within 72 hours, report to the Agency the name and license number of a participant who has failed to comply with any other provisions of the RMA and the circumstances surrounding the failure to comply. This includes, but is not limited to, reporting the following: • ALL relapses to the Agency within 72 hours of receiving notice. The Agency will then determine the appropriate action to take, including whether a complaint should be initiated by the Board. • Within 72 hours report to the Agency, a participant that the program becomes aware of who is formally charged or convicted of a crime while participating in the WVR program. 	<p>Birchwood Solutions is able to <u>timely</u> provide all required reports to the Agency. The following reports will be provided <u>timely</u> to the Agency:</p> <ul style="list-style-type: none"> • All positive or dilute UDS submitted as well as all missed drug screens to Agency within 72 hours of being notified of the MRO validated drug screen results, a dilute specimen provided by the impaired practitioner, or a missed UDS. • All missed or incorrectly submitted work site or self-reports to the Agency within 15 days of the missed report deadline. • Within 72 hours, report to the Agency the name and license number of a participant who has failed to comply with any other provisions of the RMA and the circumstances surrounding the failure to comply. This includes, but is not limited to, reporting the following: • ALL relapses to the Agency within 72 hours of receiving notice. The Agency will then determine the appropriate action to take, including whether a complaint should be initiated by the Board. • Within 72 hours report to the Agency, a participant that the program becomes aware of who is formally charged or convicted of a crime while participating in the WVR program.
4.1.4 Services to Eligible Participants		
4.1.4.1	<p>Provide services for students, applicants or licensees who are licensed, registered, certified and/or regulated by the Agency under Chapter 10, Article 7, et. Seq. of the West Virginia Code. Should a disagreement over eligibility determination arise, the final eligibility determination will be made by the Agency at its sole discretion.</p>	<p>Birchwood Solutions shall provide services for students, applicants or licensees who are licensed, registered, certified and/or regulated by the Agency under Chapter 10, Article 7, et. Seq. of the West Virginia Code. Birchwood Solutions understands and agrees that should a disagreement over eligibility determination arise, the final eligibility determination will be made by the Agency at its sole discretion.</p>
4.1.4.2	<p>May only disclose information about an Agency investigation to the student, applicant, or license with the express approval of the Agency and only to the extent that it is necessary to carry out the Vendor's duties.</p>	<p>Birchwood Solutions will only disclose information about an Agency investigation to the student, applicant, or license with the express approval of the Agency and only to the extent that it is necessary to carry out the Vendor's duties.</p>

<p>4.1.4.3</p>	<p>Accept eligible individuals into the rehabilitation program either by voluntary referral or by involuntary referral. The rehabilitation monitoring program shall be explained, and an appointment shall be scheduled for an initial screening within 72 hours of the initial contact. The rehabilitation monitoring program may be contacted by individuals, supervisors, or professional organizations regarding individuals in need of assistance. The selected vendor shall assist in developing individual strategies including techniques for intervention to arrange a referral to the program. If the eligible individual fails to participate in the program and in the judgment of the selected vendor, the participant needs to be in the rehabilitation monitoring program, a written compliant shall be filed by the selected vendor with the Agency. Additionally, an eligible individual may be referred to the rehabilitation monitoring program by recommendation or order of the Agency.</p>	<p>Birchwood Solutions shall accept the following stipulations:</p> <ul style="list-style-type: none"> • Only eligible individuals into the rehabilitation program either by voluntary referral or by involuntary referral. • The rehabilitation monitoring program shall be explained, and an appointment shall be scheduled for an initial screening within 72 hours of the initial contact. • The rehabilitation monitoring program may be contacted by individuals, supervisors, or professional organizations regarding individuals in need of assistance. • The selected vendor shall assist in developing individual strategies including techniques for intervention to arrange a referral to the program. • If the eligible individual fails to participate in the program and in the judgment of the selected vendor, the participant needs to be in the rehabilitation monitoring program, a written compliant shall be filed by the selected vendor with the Agency. • Additionally, an eligible individual may be referred to the rehabilitation monitoring program by recommendation or order of the Agency.
<p>4.1.4.4</p>	<p>Provide intake services which includes the process of evaluating a prospective or current participant to determine their safety to practice and need for treatment; conducted by an independent and approved evaluator.</p>	<p>Birchwood Solutions will provide intake services which includes the process of evaluating a prospective or current participant to determine their safety to practice and need for treatment; conducted by an independent and approved evaluator.</p>
<p>4.1.4.5</p>	<p>Provide a list of evaluators, who meet contract requirements, to a student, applicant or licensee within five calendar days of the initial contact from the participant. Ensure evaluations conducted by evaluators are received within 15 calendar days of the scheduled evaluation date. Recruit evaluators in all geographic areas of the state which will allow for participation to be within a 75-mile radius of their location.</p>	<p>Birchwood agrees to provide a list of evaluators, who meet contract requirements, to a student, applicant or licensee within five calendar days of the initial contact from the participant. Ensure evaluations conducted by evaluators are received within 15 calendar days of the scheduled evaluation date. Recruit evaluators in all geographic areas of the state which will allow for participation to be within a 75-mile radius of their location.</p>

4.1.4.6	Ensure that all evaluators administer uniform evaluations of students, applicants or licensees in accordance with current, accepted industry standards (<i>Independent Medical Evaluation Guidelines</i>).	Birchwood Solutions shall ensure that all evaluators administer uniform evaluations of students, applicants or licensees in accordance with current, accepted industry standards (<i>Independent Medical Evaluation Guidelines</i>).
4.1.4.7	In accordance with program policies conduct training for approved evaluators annually on the program requirements, including standardizing the evaluators on administering uniform evaluations, and provide evidence of participating evaluators and submit this evidence and training materials to the Agency within ten business days following the training sessions.	Birchwood Solutions understands that in accordance with program policies conduct training for approved evaluators annually on the program requirements, including standardizing the evaluators on administering uniform evaluations, and provide evidence of participating evaluators and submit this evidence and training materials to the Agency within ten business days following the training sessions
4.1.4.8	Provide a network of appropriate treatment providers. The selected vendor shall refer the participant to a facility that is able to provide the appropriate assessment and treatment for the individual. This assessment will include aftercare, monitoring and re-entry treatment. Specific recommendations concerning the scope of practice; restrictions concerning handling, administration or possession narcotics; patient versus non-patient contact; or, length of time away from any form of practice will be included.	Birchwood Solutions will provide a network of appropriate treatment providers. The selected vendor shall refer the participant to a facility that is able to provide the appropriate assessment and treatment for the individual. The assessment will include aftercare, monitoring and re-entry treatment. Specific recommendations concerning the scope of practice; restrictions concerning handling, administration or possession narcotics; patient versus non-patient contact; or, length of time away from any form of practice will be included.
4.1.4.9	Provide compliance management services that include coordinating and monitoring the services for students, applicants and licensees from initial referral to recommended closure or release from the program. Require all program participants to sign and comply with a recovery monitoring agreement (definition).	Birchwood Solution shall provide compliance management services that include coordinating and monitoring the services for students, applicants and licensees from initial referral to recommended closure or release from the program. Require all program participants to sign and comply with a recovery monitoring agreement
4.1.4.10	Mitigating factors, including, but not limited to, the following may be taken into consideration by the selection vendor in determining the length of an individual participant's participation in the program and may case the RMA to last less than three years. Those could include the time spent in a treatment facility or treatment program before executing the RMA and/or the severity of the participant's use or abuse of alcohol or other drugs.	Birchwood Solutions recognizes that mitigating factors, including, but not limited to, the following shall be taken into consideration by the selection vendor in determining the length of an individual participant's participation in the program and may case the RMA to last less than three years. Those could include the time spent in a treatment facility or treatment program before executing the RMA and/or the severity of the participant's use or abuse of alcohol or other drugs.

4.1.4.11	Apply the criteria specified in this contract for the dismissal of a student, applicant or licensee from the program or referral to the Agency for material noncompliance with a participant contract or inability to progress.	Birchwood will apply the criteria specified in this contract for the dismissal of a student, applicant or licensee from the program or referral to the Agency for material noncompliance with a participant contract or inability to progress.
4.1.4.13	Contact the student's applicant's or licensee's employer to confirm the expectations for the monitoring of the student, applicant or student, applicant or licensee by the employee, including the student's applicants or licensee's quarterly work performance evaluation to be completed by the student's, applicant's or licensee's supervisor and submitted to the vendor each quarter.	Birchwood Solutions is prepared to contact the student's applicant's or licensee's employer to confirm the expectations for the monitoring of the student, applicant or student, applicant or licensee by the employee, including the student's applicants or licensee's quarterly work performance evaluation to be completed by the student's, applicant's or licensee's supervisor and submitted to the vendor each quarter.
4.1.4.14	The contents of the participant manual shall be approved by the Agency. Any provision made mandatory upon the participant shall be specifically written into the participant's RMA.	Birchwood Solutions acknowledges that the contents of the participant manual shall be approved by the Agency. Any provision made mandatory upon the participant shall be specifically written into the participant's RMA.
4.1.4.15	Maintain records in accordance with all state and federal confidentiality laws and regulations.	Birchwood Solutions agrees to maintain records in accordance with all state and federal confidentiality laws and regulations.
4.1.4.16	After a participant has completed the recovery monitoring agreement period, upon the participant's request, the participant will be permitted to voluntarily sign a subsequent agreement for an additional period of time. The participant is directly responsible for the cost of all monitoring conducted by the selected vendor. Monitoring of these individuals shall not be assessed to the Agency.	Birchwood Solutions recognizes that after a participant has completed the recovery monitoring agreement period, upon the participant's request, the participant will be permitted to voluntarily sign a subsequent agreement for an additional period of time. The participant is directly responsible for the cost of all monitoring conducted by the selected vendor. Monitoring of these individuals shall not be assessed to the Agency.
4.1.5 Services for the Agency		
4.1.5.1	Submitting, on a monthly basis, a written report on the activities of the program which includes in a format determined by the Agency the following:	Birchwood Solutions will submit, on a monthly basis, a written report on the activities of the program which includes in a format determined by the Agency the following:
	Quarterly and year-to-date, on a report card supplied by the Agency which includes:	Birchwood Solutions will timely provide quarterly and year-to-date, on a report card supplied by the Agency which consists of the all the following:

	<ul style="list-style-type: none"> • The number of participants making initial contact with program. • The number of participants signing participant contracts and the length of time from initial contact to the signature on the contract • The number of participants released from the program upon successful completion of the program and summary of the program evaluation of each unidentified participant. • The number of readmissions to the program by participants previously released upon successful completion of the program and the average length of time from the contract completion. • The number and nature of relapses or other acts or omissions evidencing noncompliance of program participants by category, and actions taken thereon. • The number of participants terminated from participation in the program for failure to comply with the requirements of the program • The number of participants who were readmitted from terminated participation in the program for failure to comply with the requirements of the program and the average length of time from termination • Demographic information, including raw numbers and percentages, concerning program participants including age; gender; county of residence or state if not a West Virginia resident; license status; license type including single state or multi-state; drug of choice; practice/employment setting; employment status; employment position; practice area; and method of referral to the program. 	<ul style="list-style-type: none"> • The number of participants making initial contact with program. • The number of participants signing participant contracts and the length of time from initial contact to the signature on the contract • The number of participants released from the program upon successful completion of the program and summary of the program evaluation of each unidentified participant. • The number of readmissions to the program by participants previously released upon successful completion of the program and the average length of time from the contract completion. • The number and nature of relapses or other acts or omissions evidencing noncompliance of program participants by category, and actions taken thereon. • The number of participants terminated from participation in the program for failure to comply with the requirements of the program • The number of participants who were readmitted from terminated participation in the program for failure to comply with the requirements of the program and the average length of time from termination. • Demographic information, including raw numbers and percentages, concerning program participants including age; gender; county of residence or state if not a West Virginia resident; license status; license type including single state or multi-state; drug of choice; practice/employment setting; employment status; employment position; practice area; and method of referral to the program.
4.1.5.2	Submit the following within 90 days of being awarded this contract and by August 1 of each contract year.	Birchwood Solutions shall submit the following within 90 days of being awarded this contract and by August 1 of each contract year.

	<ul style="list-style-type: none"> • Policy and procedure manual to be Agency approved, which includes a grievance procedure for participant. • List of all evaluators, treatment programs, treatment providers, and their fee structure as well as staff members associated with the Vendor and their credentials. • Copy of any forms or documents used by the Vendor in conjunction with the services of this contract. • An annual evaluation of the program, which includes in a format determined by the Agency. 	<ul style="list-style-type: none"> • Policy and procedure manual to be Agency approved, which includes a grievance procedure for participant. • List of all evaluators, treatment programs, treatment providers, and their fee structure as well as staff members associated with the Vendor and their credentials. • Copy of any forms or documents used by the Vendor in conjunction with the services of this contract. • An annual evaluation of the program in a format determined by the Agency.
4.1.5.3	Program Noncompliance: Provider must adhere to the following material noncompliance procedures.	Birchwood Solution will adhere to all the below material non-compliance procedures.
	4.1.5.3.1 <i>First incident of material noncompliance</i> – the Provider shall require the student, applicant, or licensee to refrain from nursing practice under terms and conditions set by Provider and agree to comply with program requirements as a condition of continued program participation. If the student applicant or licensee refuses to refrain from nursing practice as instructed by Provider or otherwise refuses to comply with program requirements, the Provider must refer the student, applicant, or licensee to the Board immediately.	<i>First incident of material noncompliance</i> – the Provider shall require the student, applicant, or licensee to refrain from nursing practice under terms and conditions set by Provider and agree to comply with program requirements as a condition of continued program participation. If the student applicant or licensee refuses to refrain from nursing practice as instructed by Provider or otherwise refuses to comply with program requirements, the Provider must refer the student, applicant, or licensee to the Board immediately.
	4.1.5.3.2 <i>Second incident of material noncompliance</i> – the Provider shall offer two options to the student applicant or licensee: (1) Provider referring the student, applicant or licensee to the Board within one business day, or (2) the student, applicant or licensee executing a voluntary withdrawal from nursing practice (VWOP) and taking all steps necessary to place their license on inactive status, and agreeing to comply with program requirements. If the student, applicant, or licensee fails to advise the Provider within three business days of the chosen option, the student, applicant, or licensee is deemed to have chosen option (1), and the Provider will proceed accordingly.	<i>Second incident of material noncompliance</i> – the Provider shall offer two options to the student applicant or licensee: (1) Provider referring the student, applicant or licensee to the Board within one business day, or (2) the student, applicant or licensee executing a voluntary withdrawal from nursing practice (VWOP) and taking all steps necessary to place their license on inactive status, and agreeing to comply with program requirements. If the student, applicant, or licensee fails to advise the Provider within three business days of the chosen option, the student, applicant, or licensee is deemed to have chosen option (1), and Provider will proceed accordingly.
	4.1.5.3.3 <i>Third incident of material noncompliance</i> – the Provider shall refer the student applicant or licensee to the Board within one business day of	<i>Third incident of material noncompliance</i> – the Provider shall refer the student applicant or licensee to the Board within one business day of the third incident of material

		the third incident of material noncompliance. The referral shall include a Memorandum of Non-compliance outlining the current status or prognosis of the impaired student, applicant or licensee with recommendations from the Provider as to whether the Board should refer the incident for disciplinary action including potential emergency action or prosecution or if the impaired student, applicant or licensee should be dismissed from the program. Before entering into another participant contract with the student, applicant, or licensee, or continuing the current participant contract, the Provider must ensure the student, applicant, or licensee has a valid VWOP on file and has placed his/her license on inactive status with the Board.	noncompliance. The referral shall include a Memorandum of Non-compliance outlining the current status or prognosis of the impaired student, applicant or licensee with recommendations from the Provider as to whether the Board should refer the incident for disciplinary action including potential emergency action or prosecution or if the impaired student, applicant or licensee should be dismissed from the program. Before entering into another participant contract with the student, applicant, or licensee, or continuing the current participant contract, the Provider must ensure the student, applicant, or licensee has a valid VWOP on file and has placed his/her license on inactive status with the Board.
	4.1.5.3.4	Relapse episode – A relapse episode is treated as an incident of material noncompliance above. In addition, the Provider shall require the student, applicant, or licensee to enter into a recovery plan acceptable to the Provider. In instances where the recovery plan involves treatment initiated beyond the 14 day relapse period, such as awaiting inpatient treatment or the coordination of resources, the participant is still considered in the initial relapse period and the Provider will ensure the participant is still refrained from practice by Provider or has a VWOP inactivation license on file with the Board, as applicable. However, further acts or omissions that occur beyond the 14 days relapse episode cannot be counted as a continuing episode of relapse or be allowed to begin another 14 days episode of relapse. All subsequent incidents of material noncompliance shall be counted separately and be considered separate and additional incidents of material noncompliance.	Relapse episode – A relapse episode is counted as an incident of material noncompliance above. Also, the Provider shall require the student, applicant or licensee to enter into a recovery plan acceptable to the Provider. In instances where the recovery plan involves treatment initiated beyond the 14 day relapse period, such as awaiting inpatient treatment or the coordination of resources, the participant is still considered in the initial relapse period and the Provider will ensure the participant is still refrained from practice by Provider or has a VWOP inactivation license on file with the Board, as applicable. However, further acts or omissions that occur beyond the 14 days relapse episode cannot be counted as a continuing episode of relapse or be allowed to begin another 14 days episode of relapse. All subsequent incidents of material noncompliance shall be counted separately and be considered separate and additional incidents of material noncompliance.
	4.1.5.3.5	A VWOP (license on inactive status) shall remain in effect until the Board receives from the Provider a rescission form to rescind the VWOP and the participant shall apply for reinstatement of their license.	A VWOP (license on inactive status) shall remain in effect until the Board receives from the Provider a rescission form to rescind the VWOP, and the participant shall apply for reinstatement of their license.

		<p>First, second and third incidents of material noncompliance or inability to progress are counted from the date a student, applicant or licensee signs a participant contract, until the participant has successfully completed the program or has had his or her participant contract terminated by Provider or is otherwise dismissed from the program. Modifications by Provider to an existing participant contract continue rather than reset then number of incidents of material noncompliance by the student applicant or licensee.</p> <p>Notwithstanding the above paragraphs, and regardless of the number of incidents of material noncompliance as defined by this contract, when in the opinion of the Provider a student, applicant or licensee with an impairment has not progressed satisfactorily in the program, the Provider may refer the student, applicant or licensee to the Board.</p>	<p>First, second and third incidents of material noncompliance or inability to progress are counted from the date a student, applicant, or licensee signs a participant contract, until the participant has completed the program or has had his or her participant contract terminated by Provider or is dismissed from the program. Modifications by Provider to an existing participant contract continue rather than reset then number of incidents of material noncompliance by the student applicant or licensee.</p> <p>Notwithstanding the above paragraphs, and regardless of the number of incidents of material noncompliance as defined by this contract, when in the opinion of the Provider a student, applicant or licensee with an impairment has not progressed satisfactorily in the program, the Provider may refer the student, applicant or licensee to the Board.</p>
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JOB DESCRIPTION – CASE MANAGER

QUALIFICATIONS:

Registered Nurse in the State of West Virginia with an active unencumbered license and five years of experience working in monitoring and recovery program case management for nurses.

DUTIES:

- Throughout the program provides confidential support and guidance to participants.
- Ensures that sufficient and current disclosure statements and authorizations to release information are on file for each participant to comply at all times with federal and state confidentiality laws.
- With a current release of information authorization, communicates with participants, their treatment providers, counselors, facilitators, group support leaders, employers, family members, or other significant parties as needed and necessary to provide support.
- Monitors random drug screen results of participants and responds accordingly to positive screens.
- Analyze and review reports from participants and treatment providers to keep abreast of each participant's progress.
- Records detailed notes in participant files; thoroughly describe incidences clearly and accurately.
- Maintains an attitude of caring support for the participants at all times and exhibits professional understanding while guiding participants and maintaining professional boundaries.



JOB DESCRIPTION – EXECUTIVE DIRECTOR

QUALIFICATIONS:

Master's Degree from an accredited college or university and five years of professional experience, or any combination of education and experience as deemed appropriate by the board of directors.

DUTIES:

- With the complete authority of the board of directors, manages the overall operation of the agency.
- Ensures all federal and state legal requirements are met and maintained.
- Develops policies and procedures and monitors compliance
- Evaluates the agency for improvement, expansion and growth, stability, and success.
- Responsible for fiscal, budgetary, personnel, contracts, marketing, reporting, and all other executive administrative areas.
- Responsible for all costs incurred in the performance of the duties necessary for the provision of services to participants.



JOB DESCRIPTION – OPERATIONS MANAGER

QUALIFICATIONS:

Degree from an accredited college or university and five years of professional experience, or any combination of education and experience as deemed appropriate by the executive director.

DUTIES:

- Support initiatives in the management team and organizationally that help boost long-term operational excellence and growth.
- Assist in daily operations and resolving issues, if any.
- Plan, coordinate, and manage administrative procedures.
- Ensure the smooth and adequate flow of information within and outside the agency and work to improve organizational processes and to improve quality, productivity, and efficiency.
- Multitask, problem-solve and provide support to the executive director.
- Assist with special projects as assigned by the executive director.
- Support improved information flow throughout within and outside the agency.
- Prepares routine and non-routine reports.

11/08/2019

To whom it may concern,

This letter is to confirm our business relationship with Birchwood Solution, LLC is currently in a positive standing. If you have any additional questions or concerns regarding this matter, I can be reached at 615-791-5115.

Thank you,



Amy Love
AVP, Branch Manager

November 11, 2019

To Whom It May Concern,

I am happy to provide credit information regarding Birchwood account with WorX Solutions. The organization has been a very dependable customer for 7 years and has paid all their obligations in a timely manner. We have always viewed their account favorably.

Should you have any questions or need further assistance, please contact me at 615-336-7094 or email dennisj@worxsolution.com.

Sincerely,

A handwritten signature in black ink, appearing to read "Dennis Jackson", with a long horizontal flourish extending to the right.

Dennis Jackson

Managing Partner

WorX Solutions



Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Request for Quotation
34 — Service - Prof

Proc Folder: 637020

Doc Description: WV RESTORE -REFERRAL, TREATMENT & MONITORING MANAGEMENT

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
2019-11-01	2019-11-15 13:30:00	CRFQ 0907 RNB2000000001	1

BID RECEIVING LOCATION

BID CLERK

DEPARTMENT OF ADMINISTRATION

PURCHASING DIVISION

2019 WASHINGTON ST E

CHARLESTON

WV 25305

US

VENDOR

Vendor Name, Address and Telephone Number:

Birchwood Solutions, LLC

342-B Main Street, Franklin, TN 37064

615-348-6089

FOR INFORMATION CONTACT THE BUYER

Jessica S Chambers

(304) 558-0246

jessica.s.chambers@wv.gov

Signature X

FEIN #

47-2874273

DATE

11-12-19

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION:

The West Virginia Purchasing Division is soliciting bids on behalf of West Virginia Board of Examiners for Registered Professional Nurses (Agency) to establish a contract for the Referral, Treatment and Monitoring segment of the nursing health program referred to here after as "West Virginia Restore" (WVR) per the terms and conditions and specifications as attached.

INVOICE TO	SHIP TO
WV BOARD OF EXAMINERS FOR REGISTERED PROFESSIONAL NURSES 90 MACCORKLE AVE SW, STE 203 CHARLESTON WV25303 US	WV BOARD OF EXAMINERS FOR REGISTERED PROFESSIONAL NURSES 90 MACCORKLE AVE SW, STE 203 CHARLESTON WV 25303 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Monthly Cost for Healthcare providers specialists services	12.00000	MO	\$17,997.00	\$215,964.00

Comm Code	Manufacturer	Specification	Model #
85121700			

Extended Description :

Vendor should insert their monthly cost for year one of contract services.

INVOICE TO	SHIP TO
WV BOARD OF EXAMINERS FOR REGISTERED PROFESSIONAL NURSES 90 MACCORKLE AVE SW, STE 203 CHARLESTON WV25303 US	WV BOARD OF EXAMINERS FOR REGISTERED PROFESSIONAL NURSES 90 MACCORKLE AVE SW, STE 203 CHARLESTON WV 25303 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	Year Two Monthly Cost for Healthcare Services	12.00000	MO	\$17,997.00	\$215,964.00

Comm Code	Manufacturer	Specification	Model #
85121700			

Extended Description :

Vendor should insert Option Year #2 monthly cost for services.

INVOICE TO	SHIP TO
WV BOARD OF EXAMINERS FOR REGISTERED PROFESSIONAL NURSES 90 MACCORKLE AVE SW, STE 203 CHARLESTON WV25303 US	WV BOARD OF EXAMINERS FOR REGISTERED PROFESSIONAL NURSES 90 MACCORKLE AVE SW, STE 203 CHARLESTON WV 25303 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
3	Year Three Monthly Cost for Healthcare Services	12.00000	MO	\$17,997.00	\$215,964.00

Comm Code	Manufacturer	Specification	Model #
85121700			

Extended Description :

Vendor should insert Option Year #3 monthly cost for services.

INVOICE TO	SHIP TO
WV BOARD OF EXAMINERS FOR REGISTERED PROFESSIONAL NURSES 90 MACCORKLE AVE SW, STE 203 CHARLESTON WV25303 US	WV BOARD OF EXAMINERS FOR REGISTERED PROFESSIONAL NURSES 90 MACCORKLE AVE SW, STE 203 CHARLESTON WV 25303 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
4	Year Four Monthly Cost for Healthcare Services	12.00000	MO	\$17,997.00	\$215,964.00

Comm Code	Manufacturer	Specification	Model #
85121700			

Extended Description :

Vendor should insert Option Year #3 monthly cost for services.

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical Question Deadline at 9:00 AM (EDT)	19-11-07

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 10/01/2019

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: **November 7, 2019 at 9:00 AM (EDT)**

Submit Questions to: **Jessica Chambers**

2019 Washington Street, East

Charleston, WV 25305

Fax: (304) 558-4115 (Vendors should not use this fax number for bid submission)

Email: Jessica.S.Chambers@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:

BUYER: Jessica Chambers

SOLICITATION NO.: CRFQ RNB2000000001

BID OPENING DATE: 11/15/2019

BID OPENING TIME: 1:30 PM (EDT)

FAX NUMBER: (304)558-3970

Revised 10/01/2019

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 _____ 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: **November 15, 2019 at 1:30 PM (EDT)**

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

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 should 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. 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.

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: **Initial Contract Term:** This Contract becomes effective on Upon Award and extends for a period of one (1) 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 three (3) 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 prior to Contract award, in a form acceptable to the Purchasing Division.

☐

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The apparent successful Vendor shall also furnish proof of any additional licenses or certifications contained in the specifications prior to Contract award 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 cancellation, 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: 1 million per occurrence.

☐ **Automobile Liability Insurance** in at least an amount of: _____ per occurrence.

☐ **Professional/Malpractice/Errors and Omission Insurance** in at least an amount of: _____ 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: 1 million 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:

☐ _____ 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 10/01/2019

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 hearth, 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.

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.

Elizabeth S. Temple, M.Ed., President
(Name, Title)
Elizabeth S. Temple, M.Ed., President
(Printed Name and Title)
342-B Main St., Franklin, TN 37064
(Address)
Phone: 855-313-2457 Fax: 866-385-7014
(Phone Number) / (Fax Number)
etemple@birchwoodsolutions.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.

Birchwood Solutions, LLC
(Company)


(Authorized Signature) (Representative Name, Title)

Elizabeth S. Temple, M.Ed., President
(Printed Name and Title of Authorized Representative)

11-12-19
(Date)

Phone: 855-313-2457 Fax: 866-385-7014
(Phone Number) (Fax Number)

REQUEST FOR QUOTATION
NURSE HEALTH PROGRAM – WV RESTORE
Referral, Treatment and Monitoring Management

SPECIFICATIONS

1. **PURPOSE AND SCOPE:** The West Virginia Purchasing Division is soliciting bids on behalf of West Virginia Board of Examiners for Registered Professional Nurses (Agency) to establish a contract for the **Referral, Treatment and Monitoring** segment of the nursing health program referred to here after as “West Virginia Restore” (WVR). This program is to encourage voluntary participation in monitored alcohol, chemical dependency or major mental health condition. The WVR program provides ongoing support to approximately 140 participants per year.

This support will consist of a formal written agreement outlining the requirements for participation of a licensee or applicant in WVR. The agreement shall include a mutually agreed upon treatment and rehabilitation program, mandatory conditions which must be met as well as procedures to monitor compliance with their program of recovery. Public speaking, face-to-face education and outreach shall be approved by the Agency Executive Director, but should be limited, as the main purpose of this segment of WVR is the monitoring of its participants.

2. **DEFINITIONS:** The terms listed below shall have the meanings assigned to them below. Additional definitions can be found in section 2 of the General Terms and Conditions.

- 2.1 **“Applicant”** means is an individual who has submitted an application for licensure or temporary permit to practice as a registered professional nursing in the State of West Virginia.

- 2.2 **“Continuing eligibility”** means the participant shall maintain a current West Virginia nursing license to remain eligible for participation in WVR. A participant who holds an West Virginia license but who holds a license in another state and who lives or works in another state may be monitored by the state in which the participant lives or works if the other state has a similar monitoring program. A participant who lives or works in another state that does not have a monitoring program is eligible for monitoring by WVR if the participant maintains a current West Virginia license (excludes RNs working in West Virginia on a multi-state privilege). A participant who signs a contract with WVR and moves to another state shall be monitored by the other state unless the other state does not have a monitoring program. A participant who allows the West Virginia license to lapse while enrolled in WVR shall be terminated from participation in WVR until the participant’s license is reinstated. A participant whose license is revoked may no longer participate in the program.

- 2.3 **“Contract Services”** means services for the referral, treatment and monitoring segment of the nursing health program is known as West Virginia Restore (WVR) as more fully described in these specifications.

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- 2.4 **“Eligibility”** means the criteria for participation in the WVR program which includes that individual must be a current student enrolled in a pre-licensure nursing program in the State of West Virginia, currently licensed by the Agency (excludes RNs working in West Virginia on a multi-state privilege) or has applied for licensure by examination, passed the examination, and paid the appropriate fees. Is eligible for licensure by endorsement; filed an application and paid the appropriate fees; or has submitted a renewal application and paid the appropriate fees. A nurse who allows their WV license to lapse while enrolled in WVR shall be terminated from the participation in WVR until the nurse’s license is reinstated. A nurse whose license is revoked may no longer participate in the program.
- 2.5 **“Evaluation”** means the process of evaluating a prospective or current participant to determine their safety to practice and/or need for treatment which is conducted by an independent and approved evaluator.
- 2.6 **“Fit to Perform Training Program”** means the Vendor shall provide programs for worksite monitors and nursing leadership throughout the state which are evidence based best practices. The course will offer 3.0 contact hours, content to be reviewed and approved by the Agency, of approved continuing education credit through on-line courses. This shall be available within (4) months of being awarded this contract.
- 2.7 **“Evaluator”** means a licensed practitioner which has been approved by the Agency and the Vendor.
- 2.8 **“Impairment”** means a condition which is the result of the misuse or abuse of alcohol or drugs which could affect a student’s, applicant’s or licensee’s ability to practice as registered professional nurse which may inadvertently affect the care and treatment of patients.
- 2.9 **“Involuntary referral”** means the rehabilitation monitoring program may be contacted by individuals, supervisors, or professional organizations regarding individuals in need of assistance. The selected vendor shall assist in developing individual strategies including techniques for intervention to arrange a referral to the program. If the potential participant does not agree to participate in the program and in the judgment of the selected vendor, the individual needs to be in the rehabilitation monitoring program, a written complaint shall be filed by the selected vendor with the Agency. An individual may be referred to the rehabilitation monitoring program by order of the Agency.
- 2.10 **“License”** means any permit, registration, certificated or license, including a provisional license, to practice as a registered professional nurse issued by the Agency. This excludes a RN with a multi-state license from another compact state other than West Virginia.
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2.11 “Licensee” means any person issued a license.

2.12 “Material Noncompliance and/or Inability to Progress” means any one or more of the following acts or omissions:

- Positive and confirmed drug screen not explained by a prescription or practitioner’s order acceptable to Vendor
- Unexcused drug screen
- Tampered drug screen
- Unexcused absences from required meetings, therapy, evaluations or other occasions where attendance is mandatory under the participant’s contract with WVR
- Diversion of drugs
- Ingestion of drugs or alcohol in violation of the participant’s contract with WVR
- Illegal possession of drugs
- Prescription forgery
- Arrests involving the use of or possession alcohol or drugs
- When medication is prescribed to treat an illness or condition which may cause impairment, the failure to take the medication as prescribed
- When the participant is restricted from access to narcotics or other substances, violation of the restriction
- Failure to notify the current employer of their participant contract restriction pertinent to employment
- Unexcused failure to respond to contact from WVR
- Other admitted, confirmed, or diagnosed relapse, or conduct which the Agency and/or vendor deems material noncompliance
- Participant’s inability to safely practice his or her profession despite compliance with treatment, response to treatment and prognosis of condition

2.13 “Monitoring” means the Vendor’s surveillance of a participant to ensure compliance with the participant’s contract

2.14 “Participant Contract” means a formal written document known as the Recovery Monitoring Agreement outlining the requirement for a participant to successfully complete the program, including the participant’s monitoring plan

2.15 “Program participant or Participant” means an individual with an alcohol, chemical dependency or major mental health condition that is engaged in a participant contract with Vendor

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2.16 “Pricing Pages” means the pages, contained wvOASIS or attached hereto as **Exhibit A**, upon which Vendor should list its proposed price for the Contract Services.

2.17 “Recovery Monitoring Agreement” (RMA) means a structured plan of treatment, rehabilitation and monitoring with which the participant will comply and for which the Vendor will collect documentation as described in this contract. Elements that may be contained within in a monitoring plan include but not limited to:

- Treatment and therapy recommendations, including aftercare;
- Treatment and therapy participation, including aftercare;
- Requirements for monitoring and supervision which must be met by the participant
- State conditions under which the rehabilitation monitoring program may be successfully completed or terminated due to lack of cooperation or compliance
- Require the participant to sign a waiver which will allow Agency personnel to review random samples of participant files for participant program compliance. If the participant was not referred by the Agency or unknown to the Agency, the file will be de-identified by the Vendor.
- Require the participant to sign a release to seek information or records related to the participant’s impairment, which information may come from family, peers, medical personnel, pharmacies, employers, or treatment providers;
- State the amount of money to be assessed to the participant for participation in the program, including additional amounts that may be assessed if the practitioner is non-compliant with the RMA
- Intake documents must include a waiver allowing WVR to share all information with Agency in the event of positive or diluted drug screens and other alleged violations of the terms of the RMA or Agency final orders.
- An abstinence-based 12 Step participation program, including, but not limited to, Alcoholics Anonymous or Narcotics Anonymous;
- Professional support group participation as defined by the Agency and in conjunction with the Professional Support Group Vendor.
- Special treatment, such as pain management, psychiatric, or psychological treatment;
- Work activities, including return-to-work issues and ongoing monitoring of work performance and compliance with work restrictions;
- Random drug testing no less than eighteen (18) to twenty-four (24) times per year
- Worksite reports from participant’s employer no less than a quarterly basis
- Termination from the rehabilitation monitoring program for failure to comply with program requirements

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2.18 RMA Duration” means the Vendor must tailor each participant’s program to fit the following timelines:

- Alternative to Discipline RMA programs must be completed in no less than three (3) years or greater than 5 years.
- The program length for a participant’s RMA discipline probation in WVR will be determined by the Agency.
- The program length for RMA voluntary, non-discipline participants in WVR will be determined by the Vendor at the discretion of the clinical team.
- Relapses and other failures to comply with the terms of the RMA may result in a longer period of monitoring. An addendum to the RMA may be initiated when appropriate. The monitoring program shall not exceed five (5) years except in case of extenuating circumstances. Participation in the monitoring program beyond the five (5) year maximum must receive preauthorization from the Agency.
- Factors to be taken into consideration for deterring the length of an individual participant’s RMA include, but are not limited to, the duration and severity of the participant’s drug or alcohol abuse and the time the participant has spent in a treatment facility or treatment program before executing the RMA.

2.19 “Relapse” means reoccurrence to drug use and/or a fourteen (14) day period of time during which a participant exhibits two (2) sequential acts or omission, each constitution a material non-compliance or inability to progress

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

2.21 “Treatment Program” means a program:

- The primary treatment staff including the medical director, counselors, and practitioners is experienced in treating individuals affected by the use or abuse of alcohol or other drugs.
- The staff consists of a balance between both recovering and non-recovering members.
- The counselors are certified in the field of addiction. It is preferable that the nursing staff members are certified in the field of addiction.
- A comprehensive assessment and evaluation are completed upon admission. An individualized treatment plan based on an individual participant’s needs is created and followed during treatment with modifications during treatment as clinically indicated.
- The treatment program must be able to appropriately respond to differences of age, gender, race, ethnicity, national origin, religion, sexual orientation, disability, language or socioeconomic status. The selected Vendor may assist

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treatment programs in recognizing and addressing the special needs of a participant.

- The treatment program/facility is accredited by Joint Commission on Accreditation of Hospitals Organizations (JCAHO) or other appropriate agencies, including, but not limited to, the Commission on Accreditation for Rehabilitation Facilities (C.A.R.F.), the Council on Accreditation of Services for Families and Children (C.O.A.), ???any others???
- The treatment program offers and encourages participation in a structured family treatment component.
- The treatment program has a structured curriculum addressing the spiritual, physical, mental, or emotional needs of the individual.
- The length of stay in treatment and recommendations for continuing care are based upon individual needs and utilize criteria accepted by the American Society for Addiction Medicine.
- The treatment program can develop and maintain cooperative relationships with and provide consultation to the participant's employer, the selected vendor, and others, as appropriate.
- While the participant is in treatment, the participant is introduced to and attends appropriate self-help groups.
- While the participant is in treatment, an individualized continuing care plan is developed for each participant to include treatment for special issues; recommendations concerning return to work date; restrictions concerning handling, dispensing or possession of controlled substances; patient or non-patient care; and other scope of practice delineations. The treatment provider will obtain appropriate releases so that discussions with the selected vendor can take place. If the participant refuses to sign such releases, the provider agrees to notify WVR of this refusal.

2.22 "UDS" means urine drug screen.

2.23 "Vendor" means an entity contracted to provide the services outline in the contract

2.24 "Voluntary referral" means contact to the program by an eligible participant. The rehabilitation monitoring program shall be explained, and an appointment shall be scheduled for an initial screening within 72 hours or less.

2.25 "Voluntary withdraw from practice" (VWOP) means an agreement by the participant or referral which is accessible to the public, in which the participant or referral has agreed to voluntarily withdraw from nursing practice and place their license on inactive status and to not practice in the State of West Virginia. This status is publicly available. This will remain in effect until the Vendor notifies the Agency in writing that the withdrawal may be rescinded, and the participant applies for reinstatement, and the application fee will be waived for the participant. The

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participant shall not practice as a registered professional nurse until the reinstatement process is complete and the status is returned to active.

- 2.26 “Worksite Monitoring”** means the involvement and reporting of the monitoring process for participants. Every participant working as a registered nurse is required to have a work site monitor in each work facility that is approved and trained by the Vendor. Work site monitors may not be a peer. In situations where a participant is in solo practice, the participant to contract with an outside practitioner to provide this service.
- 2.27 “Worksite Reports”** means the Vendor must require each participant to keep his or her case manager informed of his or her current place of employment, including the employer’s name, address, telephone number, and supervisor’s name. The Vendor must obtain and evaluate work site reports from each participant’s employer on no less than a quarterly basis. WVR may not accept any work site report which is not on the employer’s letterhead stationery and/or does not bear the signature of the participant’s supervisor or other designated employer representative. If a participant is not employed, the Vendor must require the participant to submit self-reports on no less than a quarterly basis. If a participant’s work status changes (for example, a participant becomes unemployed or obtains a new job), the participant must notify his or her case manager in writing with seventy-two (72) hours of this status change.
- 2.28 “WV Restore”** means the nurse health program established by the Agency under WV Code 30-7-11a for the referral, treatment and monitoring segment of the nursing health program. The WV Restore program, including the name “WV Restore” and all program policies, forms, documents, including those electronically drafted and maintained are owned by the West Virginia Board of Examiners for Registered Professional Nurses.
- 2.29 “State Holidays”** means the West Virginia official holidays as follows:
- New Year’s Day (January 1)
 - Martin Luther King Day (Third Monday in January)
 - President’s Day (Third Monday in February)
 - Memorial Day (Last Monday in May)
 - West Virginia Day (June 20)
 - Independence Day (July 4)
 - Labor Day (First Monday in September)
 - Columbus Day (Second Monday in October)
 - Veterans Day (November 11)
 - Thanksgiving (Fourth Thursday in November)
 - Day After Thanksgiving (Fourth Friday in November)
 - Christmas Day (December 25)
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In addition, time off is given for the following:

When Christmas Day and New Year's Day fall on Tuesday, Wednesday, Thursday, or Friday, the preceding half day (not to exceed four hours) on Christmas Eve (December 24) and New Year's Eve (December 31) are given as time off.

Any day on which a Primary or General election is held throughout the State, and such other days as the President, Governor, or other duly constituted authority proclaim to be official holidays or days of special observance or thanksgiving, or days for the general cessation of business, is given as time off.

When a holiday falls on a Saturday, the previous Friday is observed; when a holiday falls on a Sunday, the following Monday is observed.

3. **QUALIFICATIONS:** Vendor, or Vendor's staff if requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum qualifications:

Vendor must provide any documentation requested by the State to assist in confirmation of compliance with this provision. References, documentation, or other information to confirm compliance with this experience requirement may be requested

- 3.1 Previous experience operating a program similar to this program in monitoring addiction, alcohol, chemical dependency, major mental health condition and case management.
- 3.2 Case manager(s) must be a Registered Professional Nurse in the State of West Virginia with an active unencumbered license with 5 (five) years of experience working in monitoring and recovery program case management for nurses. The vendor may be required to provide documentation verifying compliance with this section of the contract. The ratio of case managers to participants shall not exceed the 100 participants to 1 case manager. There shall be a minimum of 1 (one) full time case manager throughout the contract. It is preferred the case manager be certified in addiction nursing (CARN) and/or case management.
- 3.3 Employ or contract for the services of a certified Medical Review Officer (MRO) by the Medical Review Officer Certification Council. The MRO must be certified by the American Society of Addiction Medicine.

4. MANDATORY REQUIREMENTS:

- 4.1 Mandatory Contract Services Requirements and Deliverables:** Contract Services must meet or exceed the mandatory requirements listed below.
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4.1.1 Case Management

- 4.1.1.1** The Vendor must be able to accommodate participants needs, confidentiality and meeting space. Additionally, the vendor must provide a modification for a participant who cannot travel to the Vendor due to hardship (for example vendor travel to the area of the participant). The Vendor services shall be open Monday through Friday from 8:00 am - 4:30 pm EST. and follow the same holiday schedule as the State of West Virginia. Additionally, the Vendor shall be available upon special request by a participant or the Agency by appointment.
- 4.1.1.2** The vendor shall answer any calls into WVR after the hours of operation, on weekends and all holidays. There shall be a mutually agreed upon triage list for WVR to respond immediately approved by the Agency.
- 4.1.1.3** Collaborate with the selected vendor of the facilitated peer support groups to exchange appropriate data related to participant compliance with their RMA.
- 4.1.1.4** Adequate support services must be provided to meet the program needs. Support staff should have good communication and technical skills.
- 4.1.1.5** Operate, maintain and update the WV Restore website 24 hours per day and 7 days a week. All content shall be approved by the Agency and the Agency maintains all intellectual property rights to the website. The Vendor is required to surrender to any passwords or other access information necessary to transfer control of the website to another Vendor if requested.

4.1.2 Toxicology Testing and Reporting

- 4.1.2.1** Contract with a third party to conduct random toxicology testing on program participants and provide test reporting as described below. All testing and reporting must meet the standards for multistate research group through the National Organization of Alternative Programs. Costs of the drug screens costs are the responsibility of the participant.
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- 4.1.2.2** Ensure that all screening laboratories utilized for drug testing shall have policies and procedures for chain of custody and shall provide results directly to the WVR.
- 4.1.2.3** A program for screening must include facilities at locations throughout the state of West Virginia.
- 4.1.2.4** Require the laboratory vendor (or third-party administrator of laboratory services) to provide the capability of obtaining a witnessed urine specimen. Appropriate policies and procedures shall be in place to accomplish this objective and determine which participants shall have witnessed screens. The confirmation test for a specimen initially testing positive for a prohibited substance are confirmed by either gas or liquid chromatography in conjunction with mass spectrometry (gg/ms or lc/lc/ms.). The vendor shall complete quality monitoring of the laboratory vendor/services are compliant with program requirements and report to the Agency annually. If the laboratory vendor/services are not compliant a correction plan shall be required and reported to the Agency within 15 days.
- 4.1.2.5** Disclose in writing to the Agency with the bid and any time during the contract, any interest the selected vendor has in a facility, service, or laboratory to which a participant is referred which would be a conflict of interest.
- 4.1.2.6** Ensure that the panel of substances to be tested for in each participant's UDS must include each participant's "drug(s) of choice," meaning any substance or substances which the participant is known to have been habitually ingesting.
- 4.1.2.7** Utilize the current electronic database (Affinity eHealth) to capture and provide immediate access to secure communication with WV Restore nurse participants, in addition to on-line "real time" reporting by the nurse participant's worksite supervisor and Nurse Support Group Vendor.

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4.1.3 Vendor Reporting Requirements for Involuntary Referral Participants

For involuntary referral participants, the Vendor must report:

- All positive or dilute UDS submitted as well as all missed drug screens to Agency within seventy-two (72) hours of being notified of the MRO validated drug screen results, a dilute specimen submitted by the impaired practitioner, or a missed UDS.
- All missed or incorrectly submitted work site or self-reports to the Agency within fifteen (15) days of the missed report deadline.
- Within seventy-two (72) hours report to the Agency the name and license number of a participant who has failed to comply with any other provisions of the RMA and the circumstances surrounding the failure to comply. This includes, but is not limited to, reporting the following: Any missed drug or alcohol screens, adulterated or diluted specimens, or positive drug or alcohol test results; Any missed case manager meetings; Any failure to comply with case manager requests for required information; Any failure to participate in assigned rehabilitation counseling and treatment; Any substantial change in the participant's work or home life (such as loss of a job, and the circumstanced attendant thereto, a change in work assignment or employer, any workplace disciplinary measures imposed on the participant and the circumstances which caused the discipline to be imposed; and a new home address.
- ALL relapses to the Agency within seventy-two (72) hours of receiving notice. The Agency will then determine the appropriate action to take, including whether a complaint should be initiated by the Board.
- Within seventy-two (72) hours report to the Agency a participant that the program becomes aware of who is formally charged or convicted of a crime while participating in the WVR program.

4.1.4 Services to Eligible Participants:

4.1.4.1 Provide services for students, applicants or licensees who are licensed, registered, certified and/or regulated by the Agency under *Chapter 30, Article 7, et. seq. of the West Virginia Code*. Should a disagreement over eligibility determination arise, the final eligibility determination will be made by the Agency at its sole discretion.

4.1.4.2 May only disclose information about an Agency investigation to the student, applicant, or licensee with the express approval of the Agency and only to the extent that it is necessary to carry out the Vendor's duties.

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- 4.1.4.3** Accept eligible individuals into the rehabilitation program either by voluntary referral or by involuntary referral. The rehabilitation monitoring program shall be explained, and an appointment shall be scheduled for an initial screening within 72 hours of the initial contact. The rehabilitation monitoring program may be contacted by individuals, supervisors, or professional organizations regarding individuals in need of assistance. The selected vendor shall assist in developing individual strategies including techniques for intervention to arrange a referral to the program. If the eligible individual fails to participate in the program and in the judgment of the selected vendor, the participant needs to be in the rehabilitation monitoring program, a written complaint shall be filed by the selected vendor with the Agency. Additionally, an eligible individual may be referred to the rehabilitation monitoring program by recommendation or order of the Agency.
- 4.1.4.4** Provide intake services which includes the process of evaluating a prospective or current participant to determine their safety to practice and need for treatment; conducted by an independent and approved evaluator.
- 4.1.4.5** Provide a list of evaluators, who meet contract requirements, to a student, applicant or licensee within five (5) calendar days of the initial contact from the participant. Ensure evaluations conducted by evaluators are received within fifteen (15) calendar days of the scheduled evaluation date. Recruit evaluators in all geographic areas of the state which will allow for participants to be within a 75-mile radius of their location.
- 4.1.4.6** Ensure that all evaluators administer uniform evaluations of students, applicants or licensees in accordance with current, accepted industry standards (Independent Medical Evaluation Guidelines).
- 4.1.4.7** In accordance with program policies conduct training for approved evaluators annually on the program requirements, including standardizing the evaluators on administering uniform evaluations, and provide evidence of participating evaluators and submit this evidence

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and training materials to the Agency within ten (10) business days following the training session.

- 4.1.4.8** Provide a network of appropriate treatment providers. The selected vendor shall refer the participant to a facility that is able to provide the appropriate assessment and treatment for the individual. This assessment will include aftercare, monitoring and re-entry after treatment. Specific recommendations concerning the scope of practice; restrictions concerning handling, administration or possession of narcotics; patient versus non-patient contact; or, length of time away from any form of practice will be included.
- 4.1.4.9** Provide compliance management services that include coordinating and monitoring the services for students, applicants and licensees from initial referral to recommended closure or release from the program. Require all program participants to sign and comply with a recovery monitoring agreement (definition).
- 4.1.4.10** Mitigating factors, including, but not limited to, the following may be taken into consideration by the selected vendor in determining the length of an individual participant's participation in the program and may cause the RMA to last less than three (3) years. Those could include the time spent in a treatment facility or treatment program before executing the RMA and/or the severity of the participant's use or abuse of alcohol or other drugs.
- 4.1.4.11** Apply the criteria specified in this contract for the dismissal of a student, applicant or licensee from the program or referral to the Agency for material noncompliance with a participant contract or inability to progress.
- 4.1.4.12** Require students, applicants or licensees to provide their employers with a copy of their participant contract.
- 4.1.4.13** Contact the student's, applicant's or licensee's employer to confirm the expectations for the monitoring of the student, applicant or student, applicant or licensee by the employer, including the student's, applicant's or licensee's quarterly work performance evaluation to be

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completed by the student's, applicant's or licensee's supervisor and submitted to the vendor each quarter.

4.1.4.14 The contents of the participant manual shall be approved by the Agency. Any provision made mandatory upon the participant shall be specifically written into the participant's RMA.

4.1.4.15 Maintain records in accordance with all state and federal confidentiality laws and regulations.

4.1.4.16 After a participant has completed the recovery monitoring agreement period, upon the participant's request, the participant will be permitted to voluntarily sign a subsequent agreement for an additional period of time. The participant is directly responsible for the cost of all monitoring conducted by selected vendor. Monitoring of these individuals shall not be assessed to the Agency.

4.1.5 Services for the Agency:

4.1.5.1 Submitting, on a monthly basis, a written report on the activities of the program which includes in a format determined by the Agency the following:

Quarterly and year-to-date, on a report card supplied by the Agency which includes:

- The number of participants making initial contact with the program
- The number of participants signing participant contracts and the length of time from initial contact to the signature on the contract
- The number of participants released from the program upon successful completion of the program and a summary of the program evaluation of each unidentified participant
- The number of readmissions to the program by participants previously released upon successful completion of the program and the average length of time from the contract completion
- The number and nature of relapses or other acts or omissions evidencing noncompliance of program participants by category, and actions taken thereon
- The number of participants terminated from participation in the program for failure to comply with the requirements of the program
- The number of participants who were readmitted from terminated

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participation in the program for failure to comply with the requirements of the program and the average length of time from termination

- Demographic information, including raw numbers and percentages, concerning program participants including age; gender; county of residence or state if not a West Virginia resident; license status; license type including single state or multi-state; drug of choice; practice/employment setting; employment status; employment position; practice area; and method of referral to the program

Additionally, the following will be reported quarterly:

- Outreach activities planned and conducted for worksite monitors and the list of names of worksite monitors
- A status report of transition of participants to monitoring by the selected vendor who are or were participants in the program as operated by the predecessor selected vendor
- A status report on staffing and other issues relating to the operation and administration of the program

4.1.5.2 Submit the following within ninety (90) days of being awarded this contract and by August 1 of each contract year:

- Policy and procedure manual to be Agency approved which includes a grievance procedure for participant.
- List of all evaluators, treatment programs, treatment providers and their fee structure as well as staff members associated with the Vendor and their credentials.
- Copy of any forms or documents used by the Vendor in conjunction with the services of this contract.
- An annual evaluation of the program which includes in a format determined by the Agency

4.1.5.3 Program Noncompliance: Provider must adhere to the following material noncompliance procedures:

4.1.5.3.1 First incident of material noncompliance- the Provider shall require the student, applicant, or licensee to refrain from nursing practice under terms and conditions set by Provider and agree to comply with program requirements as a condition of continued program participation. If the student, applicant, or licensee refuses to refrain from nursing practice as instructed by Provider or otherwise refuses to comply with program requirements, the Provider

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must refer the student, applicant or licensee to the Board immediately.

4.1.5.3.2 Second incident of material noncompliance – the Provider shall offer two options to the student, applicant or licensee: (1) Provider referring the student, applicant or licensee to the Board within one (1) business day; or (2) the student, applicant or licensee executing a voluntary withdrawal from nursing practice (VWOP) and taking all steps necessary to place their license on inactive status, and agreeing to comply with program requirements. If the student, applicant or licensee fails to advise the Provider within three (3) business days of the chosen option, the student, applicant or licensee is deemed to have chosen option (1) and Provider will proceed accordingly.

4.1.5.3.3 Third incident of material noncompliance - the Provider shall refer the student, applicant or licensee to the Board within one (1) business day of the third incident of material noncompliance. The referral shall include a Memorandum of Non-compliance outlining the current status or prognosis of the impaired student, applicant or licensee with recommendations from the Provider as to whether the Board should refer the incident for disciplinary action including potential emergency action or prosecution or if the impaired student, applicant or licensee should be dismissed from the program. Before entering into another participant contract with the student, applicant or licensee, or continuing the current participant contract, the Provider must ensure the student, applicant or licensee has a valid VWOP on file and has placed his/her license on in active status with the Board.

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4.1.5.3.4 Relapse episode- A relapse episode is treated as an incident of material noncompliance above. In addition, the Provider shall require the student, applicant or licensee to enter into a recovery plan acceptable to the Provider. In instances where the recovery plan involves treatment initiated beyond the fourteen (14) day relapse period, such as awaiting inpatient treatment or the coordination of resources, the participant is still considered in the initial relapse period and the Provider will ensure the participant is still refrained from practice by Provider or has a VWOP inactivates license on file with the Board, as applicable. However, further acts or omissions that occur beyond the fourteen (14) day relapse episode cannot be counted as a continuing episode of relapse or be allowed to begin another fourteen (14) day episode of relapse. All subsequent incidents of material noncompliance shall be counted separately and be considered separate and additional incidents of material noncompliance.

4.1.5.3.5 A VWOP (license on inactive status) shall remain in effect until the Board receives from the Provider a rescission form to rescind the VWOP and the participant shall apply for reinstatement of their license.

First, second and third incidents of material noncompliance or inability to progress are counted from the date a student, applicant or licensee signs a participant contract, until the participant has successfully completed the program or has had his or her participant contract terminated by Provider or is otherwise dismissed from the program. Modifications by Provider to an existing participant contact continue rather than reset the number of incidents of material noncompliance by the student, applicant or licensee.

Notwithstanding the above paragraphs, and regardless of the number of incidents of material noncompliance as defined in this contract, when in the opinion of the Provider a student, applicant or licensee with an impairment has not progressed satisfactorily in the program, the Provider may refer the student, applicant or licensee to the Board.

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5. CONTRACT AWARD:

5.1 Contract Award: The Contract is intended to provide Agencies with a purchase price on all Contract Items. The Contract shall be awarded to the Vendor that provides the Contract Items meeting the required specifications for the lowest overall total cost as shown on the Pricing Pages.

5.2 Pricing Pages: Vendor should complete the Pricing Pages by submitting a total monthly cost for all the services outlined in the specifications. Vendor should complete the Pricing Pages in their entirety as failure to do so may result in Vendor's bids being disqualified.

The Pricing Pages contain a list of the Contract Items and estimated purchase volume. The estimated purchase volume for each item represents the approximate volume of anticipated purchases only. No future use of the Contract or any individual item is guaranteed or implied.

Vendor should electronically enter the information into the Pricing Pages through wvOASIS, if available, or as an electronic document

- 6. PERFORMANCE:** Vendor and Agency shall agree upon a schedule for performance of Contract Services and Contract Services Deliverables, unless such a schedule is already included herein by Agency. In the event that this Contract is designated as an open-end contract, Vendor shall perform in accordance with the release orders that may be issued against this Contract.
- 7. PAYMENT:** Agency shall pay Vendor pm a monthly basis upon satisfactory completion of contract services for the previous month, as shown on the Pricing Pages, for all Contract Services performed and accepted under this Contract. Vendor shall accept payment in accordance with the payment procedures of the State of West Virginia.
- 8. TRAVEL:** Vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this Contract. Any anticipated mileage or travel costs may be included in the flat fee or hourly rate listed on Vendor's bid, but such costs will not be paid by the Agency separately.
- 9. FACILITIES ACCESS:** Performance of Contract Services may require access cards and/or keys to gain entrance to Agency's facilities. In the event that access cards and/or keys are required:
- 9.1** Vendor must identify principal service personnel which will be issued access cards and/or keys to perform service.
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9.2 Vendor will be responsible for controlling cards and keys and will pay replacement fee, if the cards or keys become lost or stolen.

9.3 Vendor shall notify Agency immediately of any lost, stolen, or missing card or key.

9.4 Anyone performing under this Contract will be subject to Agency's security protocol and procedures.

9.5 Vendor shall inform all staff of Agency's security protocol and procedures.

10. VENDOR DEFAULT:

10.1. The following shall be considered a vendor default under this Contract.

10.1.1. Failure to perform Contract Services in accordance with the requirements contained herein.

10.1.2. Failure to comply with other specifications and requirements contained herein.

10.1.3. Failure to comply with any laws, rules, and ordinances applicable to the Contract Services provided under this Contract.

10.1.4. Failure to remedy deficient performance upon request.

10.2. The following remedies shall be available to Agency upon default.

10.2.1. Immediate cancellation of the Contract.

10.2.2. Immediate cancellation of one or more release orders issued under this Contract.

10.2.3. Any other remedies available in law or equity.

11. MISCELLANEOUS:

11.1. **Contract Manager:** During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract manager and his or her contact information below.

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Contract Manager: Elizabeth S. Temple

Telephone Number: 855-313-2457

Fax Number: 866-385-7014

Email Address: etemple@birchwoodsolutions.net

REQUEST FOR QUOTATION
NURSE HEALTH PROGRAM – WV RESTORE
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WEST VIRGINIA CODE

CHAPTER 30. PROFESSIONS AND OCCUPATIONS.

ARTICLE 7. REGISTERED PROFESSIONAL NURSES.

§30-7-11a. Voluntary agreements relating to alcohol or chemical dependency; confidentiality.

(a) In order to encourage voluntary participation in monitored alcohol, chemical dependency or major mental illness programs and in recognition of the fact that major mental illness, alcoholism and chemical dependency are illnesses, any person who holds a license to practice registered nursing in this state or who is applying for a license to practice registered nursing in this state may enter into a voluntary agreement with a nurse health program as defined in section one, article seven-e of this chapter. The agreement between the licensee or applicant and the nurse health program shall include a jointly agreed upon treatment program and mandatory conditions and procedures to monitor compliance with the program of recovery.

(b) Any voluntary agreement entered into pursuant to this section shall not be considered a disciplinary action or order by the board, shall not be disclosed to the board and shall not be public information if:

(1) Such voluntary agreement is the result of the licensee or applicant self enrolling or voluntarily participating in the board- designated nurse health program;

(2) The board has not received nor filed any written complaints regarding said licensee or applicant relating to an alcohol, chemical dependency or major mental illness affecting the care and treatment of patients; and

(3) The licensee or applicant is in compliance with the voluntary treatment program and the conditions and procedures to monitor compliance.

(c) Pursuant to this section, if any licensee or applicant enters into a voluntary agreement with a nurse health program as defined in section one, article seven-e of this chapter, and then fails to comply with or fulfill the terms of said agreement, the nurse health program shall report the noncompliance to the board within twenty-four hours. The board may initiate disciplinary proceedings pursuant to section eleven of this article or may permit continued participation in the nurse health program or both.

(d) If the board has not instituted any disciplinary proceeding as provided for in this article, any information received, maintained or developed by the board relating to the alcohol or chemical dependency impairment of any licensee or applicant and any voluntary agreement made pursuant to this section shall be confidential and not available for public information, discovery or court subpoena, nor for introduction into evidence in any medical professional liability action or other action for damages arising out of the provision of or failure to provide health care services.

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(e) Notwithstanding any of the foregoing provisions, the board may cooperate with and provide documentation of any voluntary agreement entered into pursuant to this section to licensing boards in other jurisdictions of which the board has become aware and may be appropriate.

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

CONSTRUCTION CONTRACTS: Under W. Va. Code § 5-22-1(i), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

ALL CONTRACTS: Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: Birchwood Solutions, LLC Elizabeth Temple

Authorized Signature: Elizabeth Temple Date: 11-12-19

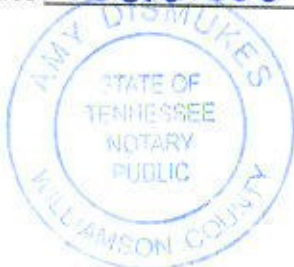
State of Tennessee

County of Williamson, to-wit:

Taken, subscribed, and sworn to before me this 12 day of November, 2019.

My Commission expires November 23, 2020.

AFFIX SEAL HERE



NOTARY PUBLIC Amy Dismukes

Purchasing Affidavit (Revised 01/19/2018)