

COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF GENERAL SERVICES
HARRISBURG

FOR: ALL USING AGENCIES OF THE COMMONWEALTH

SUBJECT: AGENCY NOTIFICATION OF AWARD

CONTRACT NAME: Personnel Training and Consulting

CONTRACT PERIOD: Beginning September 1, 1999 and Ending August 31, 2000

CONTRACT MANUAL INDICATOR: M
CONTRACT RESTRICTION CODE: 0

FIELD PURCHASE ORDERS: Using agencies may issue field purchase orders against this contract. These orders constitute the contractor's authority to make delivery. All field purchase orders received by the contractor up to and including the expiration date of the contract are acceptable and must be shipped in accordance with the delivery time specified in the contract. Contractors are not permitted to accept field purchase orders which require deliveries extended beyond the delivery time specified in the contract. Each field purchase order will be deemed to incorporate the terms and conditions set forth in this contract.

Field purchase orders may be issued through electronic data interchange ("EDI") or through facsimile equipment. EDI will involve the electronic transmission of field purchase order information from the using agency via a Value Added Network ("VAN") and the acknowledgement of receipt of the transmission by the contractor. Receipt of the electronic or facsimile transmission of the field purchase order shall constitute receipt of an order. Orders received by the contractor after 4:00 p.m. will be considered received the following business day.

In the event of the issuance of a field purchase order through EDI, the Commonwealth and the contractor specifically agree as follows:

- a. Upon receipt of an order through EDI, the contractor shall promptly and properly transmit an acknowledgement in return. Any order which is issued through EDI shall not give rise to any obligation to deliver on the part of the contractor unless and until the Commonwealth agency transmitting the order has properly received an acknowledgement.
- b. The parties agree that no hand-written signature shall be required in order for the field purchase order to be legally enforceable. To the maximum extent permitted by law, the parties hereby define and adopt the confidential codes that they will affix or include on the order to the acknowledgement as any necessary "signature" that may be required by law. Any field purchase order or acknowledgement which contains or includes the confidential code shall be deemed for all purposes to have been "signed" and to constitute an "original" when printed from electronic files or records established and maintained in the normal course of business. Neither party shall disclose to any unauthorized person the "signatures" of the other party. The Commonwealth shall share its confidential code(s) after award of the contract.
- c. The parties agree that no writing shall be required in order to make the order legally binding, notwithstanding contrary requirements in any law. The parties hereby agree not to contest the validity or enforceability of a genuine field purchase order or acknowledgement issued through EDI under the provisions of a statute of frauds or any other applicable law relating to whether certain agreements be in writing and signed by the party bound thereby. Any genuine field purchase order or acknowledgement issued through EDI, if introduced as evidence on paper in any judicial, arbitration, mediation, or administrative proceedings, will be admissible as between the parties to the same extent and under the same conditions as other business records originated and maintained in documentary form. Neither party shall contest the admissibility of copies of genuine field purchase orders or acknowledgements under either the business records exception to the hearsay rule or the best evidence rule on the basis that the order or acknowledgement shall be deemed to be genuine for all purposes if: (a) it contains the proper access code assigned to the party from which the document appears to have originated, and (b) it is transmitted to the location designated for such documents in the procedure agreed to by the parties.

- d. Each party will immediately take steps to verify any document that appears to be obviously garbled in transmission or improperly formatted to include retransmission of any such document if necessary.

ESTIMATED QUANTITIES: It shall be understood and agreed that any quantities listed in the proposal are estimated only and may be increased or decreased in accordance with the actual requirements of the Commonwealth and that the Commonwealth in accepting any bid or portion thereof, contracts only and agrees to purchase only the supplies, equipment, and materials in such quantities as represent the actual requirements of the Commonwealth. The Commonwealth reserves the right to purchase items covered by this contract from another source if the price is lower than the contract price.

IDENTIFICATION NUMBER: The contractor's federal identification number must be typed in the designated space on the Field Purchase Order.

Supply IDENTIFICATION NUMBER: Each item shown on the Field Purchase Order must be identified by its complete Supply number.

TAXES: The Commonwealth is exempt from all Federal excise and transportation taxes, is exempt from the provisions of the Fair Trade Law, and is exempt from the Pennsylvania sale and use tax upon the purchase of tangible personal property. Registration number with the Internal Revenue Service is **23740001-K**. Nothing in this paragraph is meant to exempt a construction contractor from the payment of sales or use tax required to be paid with respect to its construction contract.

ACCEPTANCE: Payment should not be construed by the awarded contractor as acceptance of equipment, goods, materials or supplies furnished under this contract. The Commonwealth reserves the right to conduct further testing and inspection after payment, but within a reasonable time after delivery, and to reject the equipment, goods, materials or supplies if such post-payment testing or inspection discloses a defect or a failure to meet specifications.

ASSIGNMENT OF ANTITRUST CLAIMS: Contractor and the Commonwealth recognize that in actual economic practice, overcharges by contractor's suppliers resulting from violations of State or Federal Antitrust Laws are in fact borne by the Commonwealth. As part of the consideration for the award of this contract, and intending to be legally bound, contractor assigns to the Commonwealth all right, title and interest in and to any claims contractor now has or may hereafter acquire under State or Federal Antitrust Laws relating to the goods or services which are the subject of this contract.

ORDERS UNDER \$1,500.00: For orders involving less than \$1,500.00, the Commonwealth will accept only a complete shipment of all items and a single invoice for the items.

OPTION TO EXTEND: The Commonwealth reserves the right to extend this contract or any part of this contract up to three (3) months. This should be utilized to prevent a lapse in contract coverage and only for the time necessary, up to three (3) months, to issue the new contract.

SPECIAL CONDITIONS AND INSTRUCTIONS

CONTRACT SCOPE/OVERVIEW: The Contract will allow Commonwealth agencies to procure their needs for quality training and consulting services and related materials on the subject of Customer Service, Process Improvement, and Communication. Other categories may be added to this Contract as necessary through mutual agreement of the Commonwealth and service providers.

SPECIAL CONDITIONS AND INSTRUCTIONS: These Special Conditions and Instructions supplement the General Conditions and Instructions to Bidders for Services as well as the Standard Contract Terms and Conditions for Statewide Services Contract. Should any discrepancy or conflict occur, these Special Conditions and Instructions shall prevail. **All sheets of this contract must be returned with bid.**

INQUIRIES: Direct all questions concerning this Contract to:

John C. Hefelfinger
Bureau of Purchases
414 North Office Building
Harrisburg, PA 17125
Telephone Number (717) 787-2389
Fax Number (717) 783-6241
e-mail: jhefelfinger@exec.gsinc.state.pa.us

TERM OF CONTRACT: The Contract shall commence on the Effective Date, which shall be no earlier than September 1, 1999, and expire on August 31, 2000.

OPTION TO RENEW: The Contract or any part of the Contract may be renewed for four (4) additional one (1) year terms by mutual agreement between the Department of General Services and the Contractor(s). If the Contract is renewed, the same terms and conditions shall apply. If the Contract is renewed for an additional year, a new performance bond or a rider supplementing the original bond will be required for the renewal term.

OPTION TO EXTEND: The Department of General Services reserves the right to extend the Contract or any part of the Contract for up to three (3) months. This will be utilized to prevent a lapse in Contract coverage and only for the time necessary, up to three (3) months, to issue the new Contract.

OPTION FOR SEPARATE COMPETITIVE BIDDING PROCEDURE: The Department of General Services reserves the right to purchase services covered under this Contract through a separate competitive bidding procedure, whenever the department deems it to be in the best interest of the Commonwealth. The right will generally be exercised only when a specific need for a large quantity of the service exists or the price offered is significantly lower than the Contract price.

COST ADJUSTMENTS: In the event of Contract renewal(s) training providers may increase or decrease their rates. The Contractor must supply any new rates for approval to the Commonwealth of Pennsylvania. Rates will not be increased until approval for them has been received in writing from the Commonwealth.

MINIMUM ORDER: The minimum order under this Contract shall be the amount set by the Department of General Services for small no bid procurements of services (currently \$3,001.00). Order amounts under the minimum are optional for both the agencies and the Contractors.

PERFORMANCE SECURITY: Awarded bidders must submit, within ten (10) days after notification, performance security in the amount of \$10,000.00. Performance security must be in the form of a specific performance bond, an annual bid and performance bond, an irrevocable letter of credit, or a certified check or bank cashier's check drawn to the order of the State Treasurer. All security shall be conditioned for faithful performance of the terms of the Contract. Failure to provide performance security within ten (10) days after

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notification may result in award to another bidder, and the bidder, who did not supply the performance security, shall be responsible for any increase in cost.

Where the bidder does not comply with the bid, purchase order, or the Contract, the amount of the Commonwealth's damages shall be liquidated to the amount of the proceeds of the check, performance bond, or letter of credit or the Commonwealth may, at its option, sue the bidder or his surety for the damages it has suffered for any breach of Contract, in which case security held by the Commonwealth shall be applied as a credit in such suit for damages. Checks deposited with the Commonwealth as a prerequisite to competitive bidding shall be placed in authorized State depositories by the Treasury Department as required by the Fiscal Code 72 P.S. Section 301. The deposit shall be returned to those bidders whose bid is not accepted and to the successful bidder upon completion of performance of the Contract. If an irrevocable letter of credit is submitted, the document must require the financial institution to pay to the Commonwealth, upon written notice, the amount demanded by the Commonwealth up to the amount of the irrevocable letter of credit.

INSURANCE: Contractors shall, at their expense, procure and maintain during the term of the Contract, the following types of insurance, issued by companies acceptable to the Department of General Services and authorized to conduct such business under the laws of the Commonwealth of Pennsylvania:

- a. Worker's Compensation Insurance for all of the Contractor's employees and those of any subcontractor, engaged in work at the site of the project as required by law.
- b. Public liability and property damage insurance to protect the Commonwealth, the Contractor, and any and all subcontractors from claims for damages for person injury (including bodily injury), sickness or disease, accidental death and damage to property, including loss of use resulting from any property damage, which may arise from the activities performed under the Contract or the failure to perform under the Contract, whether such performance or nonperformance be by the Contractor, by any subcontractor, or by anyone directly or indirectly employed by either. The limits of such insurance shall be in an amount not less than \$500,000.00 each person and \$2,000,000.00 each occurrence, personal injury and property damage combined. Such policies shall be occurrence rather than claims-made policies and shall name the Commonwealth of Pennsylvania as an additional insured. The insurance shall not contain any endorsements or any other form designated to limit and restrict any action by the Commonwealth, as an additional insured, against the insurance coverage in regard to work performed for the Commonwealth.

Prior to commencement of the work under the Contract and during the term of the Contract, the Contractor shall provide the Department of General Services with current certificates of insurance. These certificates shall contain a provision that the coverages afforded under the policies will not be cancelled or changed until at least thirty (30) days' written notice has been given to the Department of General Services.

BLANKET FIELD PURCHASE ORDERS AND PAYMENT: Commonwealth agencies may issue blanket field purchase orders against this Contract. Such orders may cover all anticipated requirements for a set period of time (i.e. a month, quarter, or remainder of the fiscal year). Note: The period of time in blanket orders may never exceed the Contract expiration date.

BILLING REQUIREMENTS: Contractors are required to establish separate billing accounts with each using agency and invoice them directly. The invoice shall be itemized with adequate detail to assist agencies in verifying charges. In no instance shall any payment be made for services that are not in accordance with the prices on the Contract price list for the Contractor.

LIMITATION OF LIABILITY: Except as otherwise provided, the Contractor's liability to the Commonwealth under the Contract shall be limited to one hundred thousand dollars (\$100,000.00). This limitation will apply, except as otherwise stated in this clause, regardless of the form of action, whether in Contract or in tort including negligence. This limitation does not, however, apply to damages for bodily injury or damage to real property or tangible personal property for which the Contractor is legally liable, nor will the limitation apply to the

Contractor's indemnity of the Commonwealth for patent, copyright, or trademark infringement.

METHOD OF AWARD: (MULTIPLE AWARD): Award will be made to all responsible and responsive bidders. Contractors will be required to furnish their services, ordered by Commonwealth agencies, at the prices on the price lists less the amount of the Contract discount, if any, plus any additional discount offered to the using agency. The Commonwealth agency shall select the Contractor for its required service from the list of Contractors on the Contract based upon best value.

STATEMENT OF WORK FOR TRAINING AND CONSULTING SERVICES, AND RELATED MATERIALS: The Contract covers the requirements of all using agencies of the Commonwealth of Pennsylvania for statewide training and consulting services, as well as related materials. More specifically, these services fit into three categories: Customer Focus; Process Improvement/Reengineering/Baldrige Performance Excellence Systems; and Communication. Under the customer focus category agencies will have access to essential support mechanisms necessary to create more customer- focused organizations. Contractors for Process Improvement category provide assistance to agencies in building a culture supportive of process improvement and performance excellence management initiatives. The Communication category will serve as a resource for agencies to acquire training, products, services and materials on written, interpersonal and presentation skills. More specific requirements are outlined on the following pages:

CUSTOMER FOCUS:

Contractors will be required to assist agencies in building a customer-focused culture inclusive of all supervisory and non-supervisory levels of the organization, from the executive level to the front-line employees who deal directly with the general public.

Contractors should address this category from a whole systems approach (see #1 below); or at a minimum demonstrate the ability to provide consulting and training in at least four (4) of the areas (2 through 14) listed below, in order to be considered for placement on the Contract.

1. Assist agency executives in creating a customer-focused organization through a **whole systems approach that includes all necessary support services, training and materials necessary to implement the proposed customer service model.**

OR ... at a minimum provide consulting and training in four (4) of the following areas:

2. Conduct consultation and training on leadership's role in creating a service culture;
3. Provide a comprehensive approach for communicating and training management in its role in creating and sustaining a service culture;
4. Provide skill building for the front line (must include options for a Train-the-Trainer and customization of training);
5. Provide tools for sustaining a service culture (including supervisory skill development and coaching);
6. Provide consulting and training in measuring, evaluating and analyzing outcomes resulting from implementation of a customer-focused initiative;
7. Provide consulting and training in refocusing the customer-focused initiative based on the results of competency measurement;
8. Facilitate/conduct/participate in meetings held on-site as needed in support of project direction, including executive sessions, development of training materials, planning, etc;
9. Design training sessions that allow for quick deployment in order to quickly reach critical mass in pilot areas and agency-wide deployment (including train-the-trainer options);
10. Conduct top-down customer service competency studies for training services;
11. Provide consulting and training on customer/market segmentation methodology;
12. Provide consulting and training on customer information systems methodology;
13. Upon request, provide one-on-one coaching to customer-focused teams to ensure productive application of lessons learned through training/consulting;
14. Assist agencies in customer satisfaction determination (developing customer surveys, service quality call, etc.)

(**Examples** of anticipated support mechanisms for this category include:)

- ◆ Executive Strategy Sessions (Leadership Commitment; Planning for an Effective Service Quality Initiative)
- ◆ Organization-wide Implementation Planning Sessions (Roll out strategies/Timeline)
- ◆ Improving Service Systems and Processes (Process Improvement; Process Mapping; Process Reengineering)
- ◆ Customer Satisfaction Determination (Conducting Service Quality Assessments; Developing Customer Report Card; Developing Customer Survey Instruments; Monitoring and Feedback Mechanisms; Customer Feedback Analysis)
- ◆ Conducting Market Segmentation Studies
- ◆ Frontline Customer Service Skill Building (must include customization and train-the-trainer options)
- ◆ Developing Customer Service Strategies
- ◆ Service Leadership (Executive/Manager's Role)
- ◆ Creating and Sustaining a Service Culture
- ◆ Comprehensive Customer Service Workshop for Managers/Supervisors

PROCESS IMPROVEMENT/REENGINEERING/BALDRIGE PERFORMANCE EXCELLENCE SYSTEMS:

Contractors will be required to assist agencies in improving/enhancing service delivery, supplier and partnering processes that will result in more efficient, effective and customer-focused processes.

Contractors should address this category from a whole systems approach (see #1 below); or at a minimum demonstrate the ability to provide consulting and training in at least four (4) of the areas (2 through 13) listed below, in order to be considered for placement on the Contract.

1. Assist agency executives in creating a customer-focused organization through a **whole systems approach** that includes all necessary support services, training and materials necessary to implement the proposed customer service model.

OR ... at a minimum provide consulting and training in four (4) of the following areas:

2. Assist agency executives and managers in developing key strategic core and business process improvement initiatives;
3. Facilitate and or provide coaching in development of follow-up implementation plans;
4. Provide team coaching in identifying, designing and planning for new change projects;
5. Provide internal process improvement support to agencies, with train the trainer options on relevant topics/courses such as facilitation, team leader training, problem solving tools, team dynamics, systems thinking, and creative thinking skills;
6. Conduct consulting and training in measuring process performance/improvement outcomes;
7. Provide consulting and training in developing and sustaining an environment that supports process improvement/change management initiatives;
8. Provide coaching and assistance in the integration of key supplier and/partnering interactions (including cross agency partnering) in the implementation of change initiatives. Communicate importance of teaming for process improvement;
9. Develop methods for monitoring the implementation of and outcomes resulting from process improvement projects;
10. Provide consulting and training in Benchmarking for Continuous Improvement;
11. Provide executives and managers with training and consulting on how to integrate process improvement/change initiatives with the agency strategic planning process;
12. Assist agencies in applying Baldrige Performance Excellence Systems criteria to their agencies, and in implementing follow-up systems to achieve excellence;
13. Provide training and consultation services to agencies on all Baldrige/Performance Excellence Systems concepts.

(**Examples** of anticipated support mechanisms for this category include:)

- ◆ Leadership Strategies for Change
- ◆ Strategies for Process Improvement
- ◆ Coaching in Process Improvement
- ◆ Facilitating Process Improvement
- ◆ Identifying Process Improvement Opportunities and Setting Goals
- ◆ Psychology of Improvement (including risk, morale, commitment)
- ◆ Organizational Transformation and Process Improvement
- ◆ Thinking "Outside the Box" (Critical, Creative, Breakthrough, and Systems Thinking)
- ◆ Designing Effective Cross Agency Teams (Teaming for Process Improvement)
- ◆ Benchmarking for Process Improvement
- ◆ Identifying Waste for Cost Reduction (Value Added Management, Process Analysis)
- ◆ Performance Measurement (including evaluation and feedback mechanisms)
- ◆ Process Management (including monitoring of process improvement projects)
- ◆ Training in Skills, Tools and Strategies for Promoting & Sustaining Innovation
- ◆ Motivation and Change Management (Creating and Fostering a support environment)
- ◆ Continuous Quality Improvement
- ◆ Leadership for Excellence (Customer Focus and; Strategic Planning and; Improvement Processes and;
- ◆ ISO9000
- ◆ Gap Analysis and Gap Closure Support (SAGA or equivalent)
- ◆ Segal Analysis
- ◆ Other Process Improvement/Baldrige Support Mechanisms meeting Contract criteria

COMMUNICATION:

Communication Training will address areas that state agencies have indicated priorities exist for employees to obtain competencies in general communication skills. Courses are to address the communication needs of employees at all levels. **Contractors will demonstrate proficiency in at least four (4) topics within each of the subcategories they are applying for:**

1. Written Communication. The purpose of this curriculum is to enable participants to write with more clarity, brevity, and impact; use correct grammar and punctuation; successfully edit their own writing; and prepare a variety of documents for a professional, government environment. Topics include:
 - ◆ Memo/Letter Writing
 - ◆ Technical Writing
 - ◆ Policy Writing
 - ◆ Report Writing/Using Sources in Writing
 - ◆ Contract Writing
 - ◆ Proposal/Grant Writing
 - ◆ Newsletter/Publication Editing
 - ◆ Grammar and Punctuation
 - ◆ Proofreading/Editing
 - ◆ Writing Press Releases
 - ◆ Writing in Teams
 - ◆ Recording and Preparing Minutes
2. Interpersonal Communication. The purpose of this curriculum is to enable participants to communicate more clearly interpersonally with co-workers and the public. The curriculum should provide the participants with an opportunity to improve working relationships through interpersonal communications. Topics include:
 - ◆ Conflict Management
 - ◆ Dealing with Difficult People
 - ◆ Team Building
 - ◆ Dealing with Office Politics
 - ◆ Communicating Effectively with Your Boss and Co-workers
 - ◆ Negotiating and Influencing

- ◆ The Communication Process
- ◆ Effective Listening
- ◆ Basic Interpersonal Communication Concepts
- ◆ Verbal and Non-verbal Skills
- ◆ Communicating Assertively
- ◆ Coaching
- ◆ Mediation
- ◆ Inter-Cultural and Gender Communication
- ◆ Personality Styles in Communication

3. Presentation and Meeting Skills. The purpose of this curriculum is to enable participants to prepare and deliver effective speeches, participate more effectively in and conduct more productive meetings with co-workers and the public. Topics include:

- ◆ Speech Writing
- ◆ Speech Delivery
- ◆ Effective Meetings
- ◆ Train-the-Trainer Skills
- ◆ Facilitation Skills
- ◆ Dealing with Public Meetings
- ◆ Team Leadership
- ◆ Internal Consulting Skills
- ◆ Managing a Committee
- ◆ Effective Use of Communication Technology

1. Upon request, Contractors will be required to supply Contract utilization reports to the Department of General Services.

Act 57	VENDOR FIN	SUFFIX	VENDOR NAME/ADDRESS	TELEPHONE NO.	FAX NO.	CONTACT PERSON
X	59-2353857		Achieve Global Inc John S. Bocko 14094 Salamander Place Tampa FL 33625	813-962-2247	813-969-0276	John S. Bocko
	23-1641605		Arbor Inc One West Third Street Media PA 19063	610-566-8700	610-566-9482	David M. Saunders
X	25-1824885		Dean R. Hooper Excellence Resources 1071 Ridgecrest Drive Hummlestown PA 17036	717-566-3600	717-566-2577	Dean Hooper
	25-1779613		Dering Consulting Group Inc 2814 Green St Harrisburg PA 17110	717-234-0567	717-234-2077	Paul Caulfield
X	13-2662069		Development Dimensions International Inc 367 Morganza Rd Canonsburg PA 15317	610-558-3070 or 800-933-4624 x 2024	610-558-3072	Patricia Bruns
X	23-2947939		Edge Learning Institute 950 Walnut Bottom Rd Suite 25-206 Carlisle PA 17013	717-249-9016	717-243-1058 dlcross69@aol. com	Dale L Cross
X	184-28-1610		George R Earhart 165 E Willow St Elizabethtown PA 17022-1967	717-361-8803		George R Earhart

Act 57	VENDOR FIN	SUFFIX	VENDOR NAME/ADDRESS	TELEPHONE NO.	FAX NO.	CONTACT PERSON
X	20-6525540		Global Quality & Engineering Consulting Sumanthi Ravindra Raj 28 Edgewood Drive Mechanicsburg PA 17055	717-795-1073	717-795-1073	Sumathi Ravindra RAJ
	54-1566093		Johnson & Johnson EFe Quality House 3970 Chain Bridge Road Fairfax VA 22030	703-359-5969	703-359-5971	Ms Wanda Savage- Moore
X	23-4884014		Jordan Smith Company 39 Saddle Drive Mt Laurel NJ 08054-9631	856-722-0594	856-722-8022	Jennifer Jordan
X	24-6000376		Penn State Harrisburg - Continuing Education 777 W. Harrisburg Pike Middletown PA 17057-4898	814-863-0674	814-863-3413	Alicia Bunnell
X	23-2959228		Pinnacle Group International 103 Chesley Drive Suites 200-203 Media PA 19063	800-461-9995	800-661-5717	Helen C. Brown
	13-4008324		PriceWaterhouse Coopers LLP Yvette D. Robinson 12902 Federal Systems Park Drive Fairfax VA 22033-4412	703-633-4123	703-633-4100	Yvette D. Robinson
	19-1325461		Productivity & Quality Consulting 1601 Hawthorne Street Pittsburgh PA 15201	412-781-5113	412-784-8437	Antoinette B. Meister
X	15-5407077		Ray Terwilliger & Associates 1509 Wyoming Avenue Forty Fort PA 18704	570-283-5273	570-283-5371	Ray Terwilliger

Act 57	VENDOR FIN	SUFFIX	VENDOR NAME/ADDRESS	TELEPHONE NO.	FAX NO.	CONTACT PERSON
	52-0851643		Sterling Institute 11211 Waples Mill Road Suite 310 Fairfax VA 22030	703-383-7650	703-383-7560	T J Brown Ph D
X	04-8609265		Svetz Consulting Services 10365 Nancy Drive, Suite 200 Meadville PA 16335	877-229-8254	814-336-2409	Gary Svetz
X	23-2016276		Take Charge Consultants 103 Garris Road P O Box 99 Downingtown PA 19335-0099	610-269-9590	610-269-2772	Daniel N Kanouse
X	39-4660656		Weber Business Services 41 S Antrim Way Greencastle PA 17225	877-927-8890	717-567-0535	Elizabeth J Weber

ITEM SHEET

ITEM NO.	COMMODITY CODE NO.	SERVICE PROVIDER	FIN NUMBER
001	9999-1450-005	Achieve Global Inc	59-2353857
002	9999-1450-010	Arbor Inc	23-1641605
003	9999-1450-015	Dean R. Hooper	25-1824885
004	9999-1450-020	Dering Consulting Group Inc	25-1779613
005	9999-1450-025	Development Dimensions International Inc	13-2662069
006	9999-1450-030	Edge Learning Institute	23-2947939
007	9999-1450-035	George R Earhart	184-28-1610
008	9999-1450-040	Global Quality & Engineering Consulting	20-6525540
009	9999-1450-045	Johnson & Johnson	54-1566093
010	9999-1450-050	Jordan Smith Company	23-4884014
011	9999-1450-055	Penn State Harrisburg - Continuing Education	24-6000376
012	9999-1450-060	Pinnacle Group International	23-2959228
013	9999-1450-065	PriceWaterhouse Coopers LLP	13-4008324
014	9999-1450-070	Productivity & Quality Consulting	19-1325461
015	9999-1450-075	Ray Terwilliger & Associates	15-5407077
016	9999-1450-080	Sterling Institute	52-0851643
017	9999-1450-085	Svetz Consulting Services	04-8609265
018	9999-1450-090	Take Charge Consultants	23-2016276
019	9999-1450-095	Weber Business Services	39-4660656

MULTI-AWARD CONTRACT #9985-05

UTILIZATION POLICY



Department of General Services

Commonwealth & North Streets

Harrisburg, PA 17125

Governor's Office of Administration

Finance Building

Harrisburg, PA 17120

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OVERVIEW

When Governor Tom Ridge came to office, he recognized that state government productivity could be improved, and time and money saved, through implementation of a streamlined procurement process. In continuing support of the Governor's mission to change the way government does business; the Governor's Office of Administration (OA) and Department of General Services (DGS) awarded Multi-Award Contract #9985-05. This contract allows Commonwealth agencies fast and easy access to training and consulting by doing business with pre-qualified vendors.

In this process, the Commonwealth outlined specifications for training and consulting services in the following areas:

- Customer Focus - agencies will have access to essential support mechanisms necessary to create more customer-focused organizations;
- Process Improvement/Reengineering/Baldrige Performance Excellence Systems - agencies will receive assistance in building a culture supportive of process improvement and performance excellence management initiatives;
- Communication - agencies will acquire training, products, services and materials on written, interpersonal and presentation skills.

(See Appendix A for details on each category.)

In response to the contract, vendors submitted bids on the publicized specifications. Vendors were rated pre-qualified based primarily on past performance through evaluation of experience and client references. Each vendor supplied a performance bond and at least three client references.

Upon qualification, a contract is executed between the qualified vendor and the Commonwealth of Pennsylvania. This contract contains standard terms and non-negotiable conditions. Visit <http://www.dgs.state.pa.us/comod/Contracts/998505.pdf> to view the contract. The contract effective date is **September 1, 1999** and expires on **August 31, 2000**. The Department of General Services reserves the right to extend the contract or any part of the contract for up to three months to prevent a lapse in contract coverage. Additionally, the contract or any part of the contract may be renewed for four additional one-year terms by mutual agreement between DGS and the Contractors.

This multi-award process allows for pre-qualification of an unlimited number of vendors that meet the requirements and specifications outlined in the contract. Vendors may become pre-qualified in one or more of the three categories. Nineteen vendors are currently authorized to provide training and consulting services through the multi-award contract.

PURCHASING VENDOR SERVICES

1. Needs Assessment:

Prior to utilizing this contract, it is cost effective for a Commonwealth agency to determine department training needs in the three contracted categories - Customer Focus, Process Improvement, and Communication. This contract will assist agencies in implementing organization-wide as well as decentralized training efforts. An assessment (whether organization-wide or bureau/division specific) helps establish an organization's priority training initiatives, as well as aligns training needs with the agency's financial resources.

Lack of an assessment may result in the multi-award contract being used to conduct training at random, or in some cases may result in reactive rather than proactive implementation of training initiatives. Agencies are encouraged to involve up front the OA Training and Development Division (T&D) in categories relating to training courses and the Bureau of Management Consulting (BMC) in categories relating to consulting services. OA T&D and BMC will collaborate in helping an agency assess its need for training or consulting services.

2. Request for Quotation:

To access services through the multiple-award contract, agencies should develop a comprehensive Request for Quotation (RFQ). An RFQ will ensure the agency and vendor are clear on the project expectations and enhance quality of service. RFQ's can be mailed, faxed, e-mailed, or delivered to the vendor in any manner the agency chooses. At this point, also send an electronic copy of the RFQ to the OA T&D.

NOTE: The comprehensiveness of the RFQ will be dictated by the scope, cost, and anticipated project outcome. *(See Appendix B for RFQ template.)*

- a) If the estimated cost of services is more than \$100,000, agencies must issue an RFQ in writing to at least three pre-qualified vendors authorized in the desired category.
- b) If the estimated cost of services is \$100,000 or less, agencies shall issue one or more RFQ.
- c) If the estimated cost of services is \$3,000 or less, use of this contract is optional for both agencies and vendors.

(See Appendix C-1 for Vendor List and C-2 for Training Category Matrix)

NOTE: Regardless of cost, all train-the-trainer courses and/or certifications must occur in Harrisburg, or at a designated site in the eastern and/or western part of Pennsylvania to accommodate participants from those same areas. No travel, subsistence, or out-service training costs will be incurred by state agencies for train-the-trainer or direct delivery of courses that are conducted out of state.

3. Response to RFQ and Selecting a Vendor:

VENDORS:

- Pre-qualified vendors that receive an RFQ will provide written detail on how they will meet the agency service requirements.

AGENCIES:

- The agency reviews the responses to the RFQ and selects a vendor. Agencies may choose a vendor by value rather than lowest cost when using the existing contracts.
- The agency forwards a copy of the approved RFQ and cover sheet to the OA Training and Development Division. The RFQ cover sheet is on-line at <http://www.dgs.state.pa.us/comod/forms/covr.doc>. (*See Appendix D for RFQ Cover Sheet.*)
- Upon selection of a vendor, the agency produces a Field Limited Purchase Order STD-182 (FLPO) and forwards it to the selected vendor so work can begin. Agencies may issue blanket field purchase orders against this contract. Such orders may cover all anticipated requirements for a set period of time (month, quarter, or remainder of the fiscal year). The period in blanket orders may never exceed the contract expiration date. The FLPO is on-line at <http://www.dgs.state.pa.us/comod/forms/fpo.doc>. (*See Appendix E for sample FLPO.*)

4. Office of Administration:

- a) The Office of Administration, Training and Development Division will use this contract to offer Customer Service and Process Improvement courses as part of the *Managing for Government Responsiveness* Program.
- b) T&D will also broker courses for a consortium of agencies that have a training need but an insufficient number of attendees to fill a class.

COMPLETION OF SERVICES

Quality of performance is essential for vendors to continue to do business with the Commonwealth. Evaluations allow the Office of Administration to monitor the quality of service provided to the agencies and subsequently serve as a reference for future engagements. The OA Training and Development Division and/or the Bureau of Management Consulting will counsel vendors that receive a poor evaluation. If a vendor receives two unsatisfactory evaluations, the vendor will be removed from the contract and agencies will be notified immediately. Agencies may contact T&D for evaluation information at any time.

Upon completion of each engagement under the multi-award contract, the agency contact person completes a performance evaluation on the respective vendor. (*See Appendix F - Evaluation of Services*) The evaluation should represent a compilation of the responses received from agency personnel involved in the project. If the project is long term (one year or longer), a biannual evaluation is required. The evaluation is available on-line at <http://www.dgs.state.pa.us/comod/Contracts/998505.pdf>. Completed evaluations are to be forwarded within ten days of conclusion of the training/consulting event to the Office of Administration at afultz@state.pa.us.

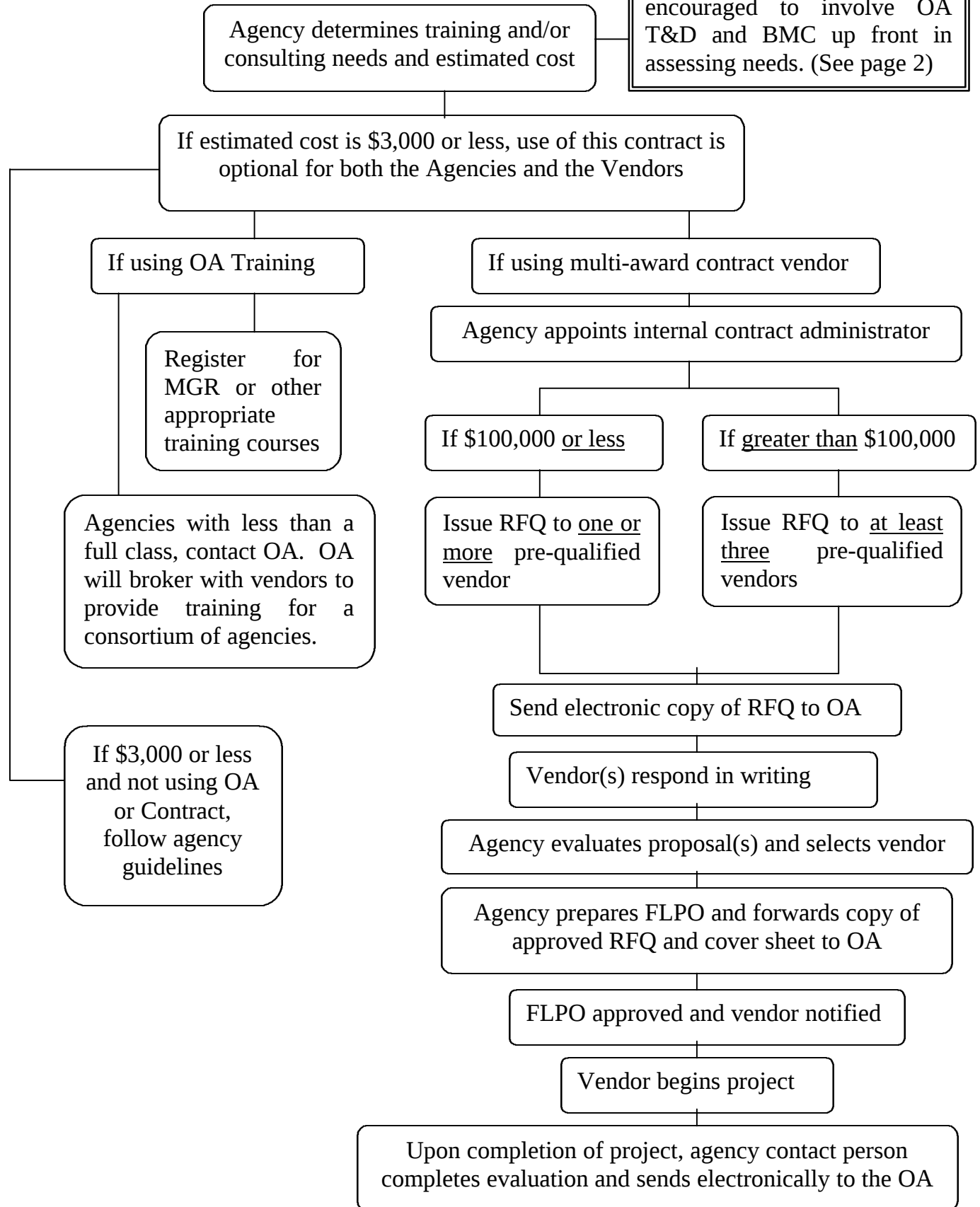
AGENCY/VENDOR CONTACT

This contract allows the purchase of training and/or consulting services. Consequently, the OA Training and Development Division and the OA Bureau of Management Consulting (BMC) play a role in this contract. In order to simplify the utilization of the contract, the Training and Development Division will administer this contract and serve as the agency/vendor contact. The T&D will refer all requests and inquiries to the BMC for review of consulting aspects. Consequently, agencies are encouraged to send documentation electronically to the OA. However, when electronic documentation is not possible, agencies should send two hard copies. Contract documentation includes: RFQ, selected vendor's response to RFQ and cover sheet, agency evaluations of vendors, and requests for clarification of topics included in the contract.

Governor's Office of Administration
Training and Development Division
Room 511, Finance Building
Harrisburg, PA 17120
Attn: Multi-Award Contract #9985-05
(717) 787-3813
E-mail: afultz@state.pa.us

FLOW CHART

NOTE: Agencies are encouraged to involve OA T&D and BMC up front in assessing needs. (See page 2)



CUSTOMER FOCUS

Vendors will assist agencies in building a customer-focused culture inclusive of all supervisory and non-supervisory levels of the organization, from the executive level to the front-line employees who deal directly with the public. Contractors may address this category from a whole systems approach (see #1 below); or at a minimum provide consulting and training in at least four of the areas (2 through 14) listed below.

1. Assist agency executives in creating a customer-focused organization through a whole systems approach that includes all necessary support services, training, and materials necessary to implement the proposed customer service model.
2. Conduct consultation and training on leadership's role in creating a service culture;
3. Provide a comprehensive approach for communicating with and training management in its role in creating and sustaining a service culture;
4. Provide skill building for the front line (must include options for a Train-the-Trainer and customization of training);
5. Provide tools for sustaining a service culture (including supervisory skill development and coaching);
6. Provide consulting and training in measuring, evaluating, and analyzing outcomes resulting from implementation of a customer-focused initiative;
7. Provide consulting and training in refocusing the customer-focused initiative based on the results of competency measurement;
8. Facilitate/conduct/participate in meetings held on-site as needed in support of project direction, including executive sessions, development of training materials, and planning;
9. Design training sessions that allow for quick deployment in order to quickly reach critical mass in pilot areas and agency-wide deployment (including train-the-trainer options);
10. Conduct top-down customer service competency studies for training services;
11. Provide consulting and training on customer/market segmentation methodology;
12. Provide consulting and training on customer information systems methodology;
13. Upon request, provide one-on-one coaching to customer-focused teams to ensure productive application of lessons learned through training/consulting;
14. Assist agencies in customer satisfaction determination (developing customer surveys, service quality call, etc.)

Examples of anticipated support mechanisms for this category include:

- ✓ Executive Strategy Sessions (Leadership Commitment; Planning for an Effective Service Quality Initiative)
- ✓ Organization-wide Implementation Planning Sessions (Roll out strategies/Timeline)

CUSTOMER FOCUS (continued)

- ✓ Improving Service Systems and Processes (Process Improvement; Process Mapping; Process Reengineering)
- ✓ Customer Satisfaction Determination (Conducting Service Quality Assessments; Developing Customer Report Card;
- ✓ Developing Customer Survey Instruments; Monitoring and Feedback Mechanisms; Customer Feedback Analysis)
- ✓ Conducting Market Segmentation Studies
- ✓ Frontline Customer Service Skill Building (must include customization and train-the-trainer options)
- ✓ Developing Customer Service Strategies
- ✓ Service Leadership (Executive/Manager's Role)
- ✓ Creating and Sustaining a Service Culture
- ✓ Comprehensive Customer Service Workshop for Managers/Supervisors

NOTE: If your agency is considering a closely related topic not specifically mentioned, please contact the OA Training and Development Division for coordination of approval.

PROCESS IMPROVEMENT/REENGINEERING/BALDRIGE PERFORMANCE EXCELLENCE SYSTEMS

Vendors will assist agencies in improving/enhancing service delivery, supplier, and partnering processes that will result in more efficient, effective, and customer-focused processes. Contractors can address this category from a whole systems approach (see #1 below); or at a minimum provide consulting and training in at least four of the areas (2 through 13) listed below.

1. Assist agency executives in creating a customer-focused organization through a whole systems approach that includes all necessary support services, training, and materials necessary to implement the proposed customer service model.
2. Assist agency executives and managers in developing key strategic core and business process improvement initiatives;
3. Facilitate and or provide coaching in development of follow-up implementation plans;
4. Provide team coaching in identifying, designing, and planning for new change projects;
5. Provide internal process improvement support to agencies, with train-the-trainer options on relevant topics/courses such as facilitation, team leader training, problem solving tools, team dynamics, systems thinking, and creative thinking skills;
6. Conduct consulting and training in measuring process performance/improvement outcomes;
7. Provide consulting and training in developing and sustaining an environment that supports process improvement/change management initiatives;
8. Provide coaching and assistance in the integration of key supplier and/or partnering interactions (including cross agency partnering) in the implementation of change initiatives. Communicate importance of teaming for process improvement;
9. Develop methods for monitoring the implementation of outcomes resulting from process improvement projects;
10. Provide consulting and training in Benchmarking for Continuous Improvement;
11. Provide executives and managers with training and consulting on how to integrate process improvement/change initiatives with the agency strategic planning process;
12. Assist agencies in applying Baldrige Performance Excellence Systems criteria to their agencies, and in implementing follow-up systems to achieve excellence;
13. Provide training and consultation services to agencies on all Baldrige/Performance Excellence Systems concepts.

(Examples of anticipated support mechanisms for this category include:

- ✓ Leadership Strategies for Change
- ✓ Strategies for Process Improvement

PROCESS IMPROVEMENT/REENGINEERING/BALDRIGE PERFORMANCE EXCELLENCE SYSTEMS (continued)

- ✓ Coaching in Process Improvement
- ✓ Facilitating Process Improvement
- ✓ Identifying Process Improvement Opportunities and Setting Goals
- ✓ Psychology of Improvement (including risk, morale, commitment)
- ✓ Organizational Transformation and Process Improvement
- ✓ Thinking “Outside the Box” (Critical, Creative, Breakthrough, and Systems Thinking)
- ✓ Designing Effective Cross Agency Teams (Teaming for Process Improvement)
- ✓ Benchmarking for Process Improvement
- ✓ Identifying Waste for Cost Reduction (Value Added Management, Process Analysis)
- ✓ Performance Measurement (including evaluation and feedback mechanisms)
- ✓ Process Management (including monitoring of process improvement projects)
- ✓ Training in Skills, Tools and Strategies for Promoting and Sustaining Innovation
- ✓ Motivation and Change Management (creating and fostering a support environment)
- ✓ Continuous Quality Improvement
- ✓ Leadership for Excellence (Customer Focus, Strategic Planning, and Improvement Processes)
- ✓ ISO9000
- ✓ Gap Analysis and Gap Closure Support (SAGA or equivalent)
- ✓ Post-SAGA Analysis
- ✓ Other Process Improvement/Baldrige Support Mechanisms meeting Contract criteria

NOTE: If your agency is considering a closely related topic not specifically mentioned, please contact the OA Training and Development Division for coordination of approval.

COMMUNICATION

Communication training will be aimed at enabling employees to achieve competencies in general communication skills that state agencies have indicated require priority attention. Courses address the communication needs of employees at all levels. Contractors will demonstrate proficiency in at least four topics listed below:

1. Written Communication. The purpose of this curriculum is to enable participants to write with more clarity, brevity, and impact; use correct grammar and punctuation; successfully edit their own writing; and prepare a variety of documents for a professional, government environment. Topics include:
 - ✓ Memo/Letter Writing
 - ✓ Technical Writing
 - ✓ Policy Writing
 - ✓ Report Writing/Using Sources in Writing
 - ✓ Contract Writing
 - ✓ Proposal/Grant Writing
 - ✓ Newsletter/Publication Editing
 - ✓ Grammar and Punctuation
 - ✓ Proofreading/Editing
 - ✓ Writing Press Releases
 - ✓ Writing in Teams
 - ✓ Recording and Preparing Minutes
2. Interpersonal Communication. The purpose of this curriculum is to enable participants to communicate more clearly interpersonally with co-workers and the public. The curriculum should provide the participants with an opportunity to improve working relationships through interpersonal communications. Topics include:
 - ✓ Conflict Management
 - ✓ Dealing with Difficult People
 - ✓ Team Building
 - ✓ Dealing with Office Politics
 - ✓ Communicating Effectively with Your Boss and Co-workers
 - ✓ Negotiating and Influencing
 - ✓ The Communication Process
 - ✓ Effective Listening
 - ✓ Basic Interpersonal Communication Concepts
 - ✓ Verbal and Non-verbal Skills
 - ✓ Communicating Assertively
 - ✓ Coaching
 - ✓ Mediation
 - ✓ Inter-Cultural and Gender Communication
 - ✓ Personality Styles in Communication

COMMUNICATION (continued)

3. Presentation and Meeting Skills. The purpose of this curriculum is to enable participants to prepare and deliver effective speeches, and to participate more effectively in and conduct more productive meetings with co-workers and the public.

Topics include:

- ✓ Speech Writing
- ✓ Speech Delivery
- ✓ Effective Meetings
- ✓ Train-the-Trainer Skills
- ✓ Facilitation Skills
- ✓ Dealing with Public Meetings
- ✓ Team Leadership
- ✓ Internal Consulting Skills
- ✓ Managing a Committee
- ✓ Effective Use of Communication Technology

NOTE: If your agency is considering a closely related topic not specifically mentioned, please contact the OA Training and Development Division for coordination of approval.

TEMPLATE FOR REQUEST FOR QUOTATION (RFQ)

This template has three parts: 1) General Information, 2) Statement of Work, and 3) Quote Format. This is a suggested format. Agencies should not limit their RFQ's to include only these sections if other sections are appropriate. Your specific Agency guidelines should be followed accordingly.

PART I - GENERAL INFORMATION**I-1 ISSUING OFFICE**

State the Agency and specific organization (bureau, division, or unit) generating the RFQ. Briefly describe the organization's responsibilities and functions within the Agency as well as any other information that will assist the service provider in understanding the mission and goals of the agency/organization.

I-2 OVERVIEW

Provide a broad overview of the scope of the work statement. Generally, the overview should include a brief history, the status of a project or requirement, problem definition, technical descriptions, and specific RFQ goals. Include a statement that identifies the purpose of the RFQ and services needed to meet the RFQ goals. This gives the Service Provider a clear understanding of the purpose and desired outcomes of the RFQ.

The project goals are:

<List of goals>

I-3 PROJECT MANAGEMENT

Identify who will be managing the project or service request and specifically describe how project management will be handled. In addition to identifying the project manager (name of a specific individual), include location/ mailing address, phone, fax, and e-mail address. Include general standard language of whom to contact for questions, payments for actual hours worked, conditions for incremental reporting, certification of deliverables, and approval for final payment. This can be as general or as specific as required for the project or as set by agency standards.

The <agency> Project Manager designated for this effort is:

<Name>
<Agency, Division>
<Building, Floor>
<Mailing Address>

Phone:<include area code>
Fax: <include area code>
Email: <Email address>

Direct all questions pertaining to this project to <project manager's name>. The selected Service Provider will be paid in monthly increments <or as designated> for actual hours worked, provided work is completed satisfactorily to the Work Plan and approved, in writing, by <project manager's name>. The selected Service Provider will not be eligible for final payment until <project manager's name> certifies, in writing, all project work has been successfully completed.

I-4 REJECTION OF QUOTES

This section should minimally state language that contains the following: "<Agency/organization> reserves the right to reject any and all quotes received from service providers as a result of this request."

This section may be specific as is required for the project or as set by agency standards.

I-5 INCURRING COSTS

This section should minimally state language that contains the following: "<Agency/organization> is not liable for any costs or expenses incurred by the Service Provider in the preparation of their quotes."

This section may be specific as is required for the project or as set by agency standards.

I-6 SUBCONTRACTING

This section may be used to control the vested interest of the Service Provider, if desired. This section may contain language that requires the Service Provider to identify the use of subcontractors as part of their proposal and ensure the use of subcontractors during the project is monitored and approved by the project manager.

I-7 RESOURCES

Identify resources that will or will not be provided by the Agency and what will or will not be made available to the Service Provider during the course of the project or development of services. Resources can be provided in the form of property, services, or information Minimally, this section should define:

- *Office or physical working space such as classrooms, storage space, training room access, etc.*
- *Supplies and Operating Support such as materials, copying, mail room services, projectors, etc.*
- *Human Resources such as clerical support, data entry staff, staff technical expertise, etc.*

This section should be specific to the requirements of the project or deliverables. This section should be properly defined to avoid assumed added costs in the proposal submittals or adversely affecting the quality of deliverables during the project.

PART II - STATEMENT OF WORK

This component of the RFQ contains a detailed description of the desired work. This section is the primary element in which the Service Provider determines costs, time, and resources needed for submittal of the proposal. Be specific with tasks, deliverables, requirements, performance standards or measures, deadlines, and any restrictions or limitations of the project.

II-1 WORK LOCATION

Identify the main work location and any remote locations required for the project or development and delivery of services.

The location for project coordination is:

<Address>

Primary Contact is:

<Name>

<Phone Number>

Alternate Contact is:

<Name>

<Phone Number>

II-2 WORK SKILLS

State the type, classification, skill level, years of experience, certifications, and/or specific qualifications desired or required for the project.

II-3 INFORMATION HANDLING

State any specific requirements to access and handle information associated with the project. Address requirements for proper disposal, copying, and distribution of such information during work on this project as well as any remaining information upon the completion of the project.

II-4 TASKS

This section is critical to obtaining appropriate services. Dissatisfaction with vendor performance can come from the agency's lack of identifying needs or addressing those needs with performance requirements. Be specific with the actual work to be performed and performance measurements.

II-5 GENERAL REQUIREMENTS

This section outlines the required services in terms of deliverables or measurable outputs. State the requirements in clear and concise language, and define in measurable terms. This section should state the expectations while staying within the scope of the project. This section may also include a description of resources required to accomplish the work such as documents, training, and equipment. Do not outline detailed procedures that dictate how the work is to be accomplished; the Service Provider must be allowed latitude as to how the work is accomplished.

II-6 PROPOSED SCHEDULE

This section establishes a start and end date for the project. All critical deadlines, time constraints, and events should be identified to the Service Provider.

PART III - QUOTE FORMAT**III-1 DETAILED WORK PLAN**

Outline what the Service Provider must submit as part of the proposal. The proposal should include a detailed work plan showing all tasks necessary to complete the work described in Part II:

- ✓ statement of work;*
- ✓ proposed recommended solution;*
- ✓ number of staff hours required to complete each task;*
- ✓ outline of different categories and prices of personnel where applicable;*
- ✓ a description of the company's experience in implementing similar projects, including the number and size of project, and outcomes;*
- ✓ number of years of relevant experience for each of the staff assigned to this effort specifically as to the required work skills as described in Part II.*

III-2 COSTS

Identify how to itemize labor and material costs as well as how to format the cost information. Be specific on how estimated hours should be broken down for the required tasks. Be specific on how the vendor should submit invoices and how payments will be made. This section should contain language that ensures any cost not provided in the cost proposal will be assumed as no charge to the Commonwealth and that the contract is a "maximum price not to exceed" contract.

III-3 PROPOSAL SUBMITTAL

This section identifies a specific date, time, person, delivery location, and acceptable method of delivery for the proposal.

VENDOR LIST**APPENDIX C-1**

FEDERAL ID #	VENDOR NAME/ADDRESS	CONTACT PERSON
59-2353857	Achieve Global Inc. 440 East Sweetford Road, Suite 3040 Wayne, PA 19087	John S. Bocko 610-971-0880 610-971-0368(fax) john.bocko@achievegloal.com
23-1641605	Arbor Inc. One West Third Street Media, PA 19063	David M. Saunders 610-566-8700 610-566-9482(fax) dmsarbor@aol.com
13-2662069	Development Dimensions International Inc. 110 Knollwood Court Aston, PA 19014	Patricia Bruns 610-558-3070 or 800-933-4624 x 2024 610-558-3072(fax) pbruns@ddiworld.com
23-2947939	Edge Learning Institute 950 Walnut Bottom Road Suite 15-206 Carlisle, PA 17013	Dale L. Cross 717-249-9016 717-243-1058(fax) dlcross69@aol.com
25-1824885	Excellence Resources, Inc 1071 Ridgecrest Drive Hummelstown, PA 17036	Dean Hooper 717-566-3600 717-566-2577(fax) drhooper@excellenceinc.com
20-6525540	Global Quality & Engineering Consulting 28 Edgewood Drive Mechanicsburg, PA 17055	Sumathi RavindraRaj 717-795-1073 717-795-1073(fax) gqec@aol.com
184-28-1610	Global Reengineering Enterprise 165 E Willow Street Elizabethtown, PA 17022-1967	George R. Earhart 717-361-8803 717-361-8547 (fax) grearhar@paonline.com
54-1566093	Johnson & Johnson Assoc., Inc. Efe Quality House 3970 Chain Bridge Road Fairfax, VA 22030	Wanda Savage-Moore 703-359-5969 703-359-5971(fax) wsavagemoore@jjaconsultants.com
23-4884014	Jordan Smith Company 39 Saddle Drive Mt Laurel, NJ 08054-9631	Jennifer Jordan 856-722-0594 856-722-8055(fax) jennjordan@earthlink.net

FEDERAL ID #	VENDOR NAME/ADDRESS	CONTACT PERSON
24-6000376	Penn State University 777 W. Harrisburg Pike Middletown, PA 17057-4898	John Marshall 717-948-6505 717-948-6276(Fax) jcm4@cde.psu.edu
23-2959228	Pinnacle Group International 103 Chesley Drive Suites 200-203 Media, PA 19063	Helen Brown 800-461-9995 800-661-5717(fax) helenb@pinnacle-grp.com
13-4008324	PriceWaterhouse Coopers LLP 12902 Federal Systems Park Drive Fairfax, VA 22033-4412	Yvette D. Robinson 717-569-1585 703-633-4100(fax) yvette.d.robinson@us.pwcglobal.com
19-1325461	Productivity & Quality Consulting 1601 Hawthorne Street Pittsburgh, PA 15201	Antoinette B. Meister 412-781-5113 412-784-8437(fax) toniconsult@compuserve.com
15-5407077	Ray Terwilliger & Associates 1509 Wyoming Avenue Forty Fort, PA 18704	Ray Terwilliger 570-283-5273 570-283-5371(fax) rtanda@prodigy.net
52-0851643	Sterling Institute 11211 Waples Mill Road Suite 310 Fairfax, VA 22030	T J Brown PhD 703-383-7650 703-383-5199(fax) govt@sterlinginstitute.com
04-8609265	Svetz Consulting Services 10365 Nancy Drive, Suite 200 Meadville, PA 16335	Gary Svetz 877-229-8254 814-336-2409(fax) gsvetz@gremlan.org
23-2016276	Take Charge Consultants 103 Garris Road P.O. Box 99 Downingtown, PA 19335-0099	Daniel N. Kanouse (601) 269-9590 (610) 269-2772(fax) tcc@takechargeinc.com
25-1779613	The Dering Consulting Group, Inc. 2814 Green Street Harrisburg, PA 17110	Paul Caulfield 717-234-0567 717-234-2077(fax) deringpc@epix.com
39-4660656	Weber Business Services 41 South Antrim Way Greencastle, PA 17225	Elizabeth J. Weber 717-597-8890 717-597-0535(fax) schemmer@cvn.net

Multi-Award Contract #9985-05
Customer Focus Category

Achieve Global/Gen. Physics
Arbor, Inc.
Devel. Dimensions Internat'l, Inc.
Edge Learning Institute
Excellence Resources, Inc.
Global Reengineering Ent.
Global Quality
Johnson & Johnson Assoc., Inc.
Jordan Smith Company
Penn State/Middletown
Pinnacle Group International
Productivity & Quality Consulting
Pricewaterhouse Coopers
Ray Terwilliger Associates
Sterling Institute
Svetz Consulting Services
Take Charge Consultants
The Dering Consulting
Weber Business Services

1.Whole Systems Approach	X	X			X			X					X				X		
2.Leadership's Role in creating a service culture			X				X				X	X		X	X	X		X	
3.Communicating & Trng. Mgmt./Creating-Sustaining Svc. Culture			X				X				X			X	X				
4.Skill Building for Front Line			X	X			X				X	X		X	X			X	
5.Tools for Sustaining a Service Culture			X	X								X		X	X	X		X	
6.Measuring, Evaluating and Analyzing Outcomes			X				X					X		X		X			
7.Refocusing the Customer-focused Initiative			X	X										X		X			
8.Facilitate/Conduct/Participate in on-site Meetings			X				X				X	X		X	X	X			
9.Quick Deployment/Critical Mass			X	X			X					X			X				
10.Top-down Customer Service Competency Studies			X											X					
11.Customer/Market Segmentation Methodology												X							
12.Customer Information Systems Methodology																			
13.One-on-one with Customer-Focused Teams			X				X					X		X	X	X		X	
14.Customer Satisfaction Determination												X		X		X			

Examples of anticipated support mechanisms for this category include:

- * Executive Strategy Sessions (Leadership Commitment; Planning for an Effective Service Quality Initiative)
 - * Organization-wide implementation Planning Sessions (Roll out strategies/Timeline)
 - * Improving Service systems and Processes (Process Improvement; Process mapping; Process Reengineering)
 - * Customer Satisfaction Determination (Conducting Service Quality Assessments; Developing Customer Report Card;
 - * Developing customer Survey Instruments; Monitoring and Feedback Mechanisms; Customer Feedback
 - * Frontline Customer Service Skill Building (must include customization and train-the-trainer options)
- * Developing Customer Service Strategies
 - * Service Leadership (Executive/Manager's Role)
 - * Creating and Sustaining a Service Culture
 - * Comprehensive Customer Service Workshop for Managers/Supervisors
 - * Conducting Market Segmentation Studies

Multi-Award Contract #9985-05
Process Improvement Category

	Achieve Global/Gen. Physics	Arbor, Inc.	Devel. Dimensions Internat'l, Inc.	Edge Learning Institute	Excellence Resources, Inc.	Global Reengineering Ent.	Global Quality	Johnson & Johnson Assoc., Inc.	Jordan Smith Company	Penn State/Middletown	Pinnacle Group International	Productivity & Quality Consulting	Pricewaterhouse Coopers	Sterling Institute	Svetz Consulting Associates	Take Charge Consulting Services	The Dering Consultants	Weber Business Services
1.Whole Systems Approach	X	X			X			X				X	X				X	
2.Key Strategic Core and Business Process Improvement Initiatives						X	X				X			X		X	X	
3.Coaching in Development of Follow-Up Implementation Plans						X	X							X		X		
4.Team Coaching - Identify, design, plan for new change projects				X		X	X				X			X		X		
5.Internal process improvement (train the trainer & team leaders)				X		X	X				X			X		X		X
6.Measuring Process Performance/Improvement Outcomes						X	X							X		X		
7.Develop and Sustain supportive environment				X		X	X				X			X		X		X
8.Key supplier and Partnering Interactions				X		X	X							X		X		
9.Monitoring Implementation and outcomes						X								X		X		
10.Benchmarking for Continuous Improvement						X	X							X		X		
11.Integrate Process Improvement w/Strategic Plan						X								X		X		X
12.Applying Baldrige Performance Excellence Systems														X				
13.All Baldrige Performance Excellence System Concepts														X				

Examples of anticipated support mechanisms for this category include:

- * Leadership Strategies for Change
 - * Strategies for Process Improvement
 - * Coaching in Process Improvement
 - * Facilitating Process Improvement
 - * Identifying Process Improvement Opportunities/Setting Goals
 - * Psychology of Improvement (including risk, morale, commitment)
 - * Organizational Transformation and Process Improvement
 - * Benchmarking for Process Improvement
- * Thinking "Outside the Box" (Critical, Creative, Breakthrough, and Systems thinking)
 - * Designing Effective Cross Agency Teams (Teaming for Process Improvement)
 - * Identifying Waste for Cost Reduction (Value Added management, Process Analysis)
 - * Performance Measurement (including evaluation and feedback mechanisms)
 - * Process Management (including monitoring of process improvement projects)
 - * Training in Skills, Tools and Strategies for Promoting & Sustaining Innovation
 - * Motivation and Change Management (Creating and Fostering a support environment)
 - * Continuous Quality Improvement

Multi-Award Contract #9985-05
Communication Category
(Written Communications)

Achieve Global/Franklin Covey
Arbor, Inc.
Devel. Dimensions Internat'l, Inc.
Edge Learning Institute
Excellence Resources, Inc.
Global Reengineering Enterprise
Global Quality
Johnson & Johnson Assoc., Inc.
Jordan Smith Company
Penn State/Middletown
Pinnacle Group International
Productivity & Quality Consulting
Pricewaterhouse Coopers
Ray Terwilliger Associates
Sterling Institute
Svetz Consulting Services
Take Charge Consultants
The Dering Consulting
Weber Business Services

1.Memo/Letter Writing	X							X		X	X							X	X
2.Technical Writing	X							X		X									X
3.Policy Writing								X						X					
4.Report Writing/Using Sources in Writing										X	X			X				X	
5.Contract Writing										X									
6.Proposal/Grant Writing								X		X									
7.Newsletter/Publication Editing											X								X
8.Grammar and Punctuation														X				X	X
9.Proofreading/Editing	X													X				X	
10.Writing Press Releases	X										X								
11.Writing in Teams								X											
12.Recording and Preparing Minutes																		X	X

The purpose of this curriculum is to enable participants to write with more clarity, brevity, and impact; use correct grammar and punctuation; successfully edit their own writing; and prepare a variety of documents for a professional, government environment.

Multi-Award Contract #9985-05
Communication Category
(Interpersonal Communications)

		<u>Achieve Global/Franklin Covey</u>	<u>Arbor, Inc.</u>	<u>Devel. Dimensions Internat'l, Inc.</u>	<u>Edge Learning Institute</u>	<u>Excellence Resources, Inc.</u>	<u>Global Reengineering Enterprise</u>	<u>Global Quality</u>	<u>Johnson & Johnson Assoc., Inc.</u>	<u>Jordan Smith Company</u>	<u>Penn State/Middletown</u>	<u>Pinnacle Group International</u>	<u>Productivity & Quality Consulting</u>	<u>Ray Terwilliger Coopers</u>	<u>Sterling Institute</u>	<u>Svetz Consulting Associates</u>	<u>Take Charge Consulting Services</u>	<u>The Dering Consultants</u>	<u>Weber Business Services</u>
1. Conflict Management			X					X				X		X	X	X	X	X	X
2. Dealing with Difficult People								X	X		X	X		X	X		X		X
3. Team Building	X		X	X				X	X		X	X		X	X	X	X	X	X
4. Dealing with Office Politics			X					X						X			X		X
5. Communicating Effective with Boss and Co-workers			X	X				X			X			X	X		X		X
6. Negotiating and Influencing			X					X	X					X	X	X	X		
7. The Communication Process			X					X			X	X		X	X		X	X	X
8. Effective Listening	X			X				X	X			X		X	X		X	X	X
9. Basic Interpersonal Communication Concepts	X		X					X	X		X	X		X	X		X		X
10.Verbal and Non-verbal Skills			X					X						X	X		X		X
11.Communicating Assertively								X	X			X			X		X		
12.Coaching	X		X					X				X		X	X	X	X		X
13.Mediation								X						X					
14.Inter-Cultural and Gender Communication				X				X	X			X		X			X	X	X
15.Personality Styles in Communication			X					X	X			X			X		X	X	X

The purpose of this curriculum is to enable participants to write with more clarity, brevity, and impact; use correct grammar and punctuation; successfully edit their own writing;

Multi-Award Contract #9985-05
Communication Category
(Presentation and Meeting Skills)

Achieve Global/Franklin Covey
Arbor, Inc.
Devel. Dimensions Internat'l, Inc.
Edge Learning Institute
Excellence Resources, Inc.
Global Reengineering Enterprise
Global Quality
Johnson & Johnson Assoc., Inc.
Jordan Smith Company
Penn State/Middletown
Pinnacle Group International
Productivity & Quality Consulting
Pricewaterhouse Coopers
Ray Terwilliger Associates
Sterling Institute
Svetz Consulting Services
Take Charge Consultants
The Dering Consulting
Weber Business Services

1.Speech Writing								X										X	
2.Speech Delivery	X							X	X					X				X	
3.Effective Meetings	X		X					X	X		X	X		X	X	X		X	X
4.Train-the-Trainer Skills			X					X				X		X	X	X		X	X
5.Facilitation Skills			X					X	X		X	X				X		X	X
6.Dealing with Public Meetings	X																		
7.Team Leadership			X					X	X			X		X	X	X		X	X
8.Internal Consulting Skills			X					X	X		X	X		X	X				X
9.Managing a Committee								X			X			X	X				
10.Effective Use of Communication Technology	X							X				X							

The purpose of this curriculum is to enable participants to prepare and deliver effective speeches, participate more effectively in and conduct more productive meetings with co-workers and the public.

Sample Form

This form is available on-line at www.dgs.state.pa.us/comod/forms/covr.doc



Multi-Award Contract #9985-05 RFQ Cover Sheet

(Use "tab" button to move between fields – Do not use enter key.)

Agency:

Agency Contact:

Telephone #:

In accordance with the Utilization Policy of Contract 9985-05 Commonwealth Agencies must complete this Cover Sheet after they initiate a Field Limited Purchase Order for services contained within the contract.

This Cover Sheet and a copy of the RFQ must be sent via email to the Office of Administration, Training and Development Division. Email address is afultz@state.pa.us.

Please answer the following questions:

FLPO Number for this RFQ:

Category : (Click on all that apply)

- ☐ Process Improvement
☐ Customer Focus

- ☐ Written Communications
☐ Interpersonal Communications
☐ Presentation and Meeting Skills

Type of Service: (Click all that apply)

- ☐ Training
☐ Consulting

Caution: Do not use "enter" key when completing fields

Number of Employees Trained:

Executives
Management
Supervisors
Professional/Technical (non-supervisory)
Administrative/Clerical
TOTAL number trained

Consulting Provided to:

(Click on all that apply)

- ☐ Executives
☐ Management
☐ Supervisors
☐ Professional/Technical (non-supervisory)
☐ Administrative/Clerical

Basis of this request: (select all that apply)

- ☐ Needs Assessment
☐ Management Directed

Date of Assessment

(e-mail completed cover sheet along with approved RFQ to afultz@state.pa.us)

APPENDIX E

STD-182

5/99

SHIP TO (FOB DESTINATION UNLESS SPECIFIED OTHERWISE): CONTACT PERSON: PHONE NO. FAX NO.	BILL TO (FURNISH ORIGINAL AND 2 COPIES OF ITEMIZED INVOICE): 	SHOW THIS CONTRACT INQUIRY NUMBER ▼ ON BID ENVELOPE AND ON INVOICE ▼
		DELIVERY DATE:
		EXPIRATION DATE:
CONTRACTOR'S NAME & ADDRESS: CONTACT PERSON: PHONE NO. FAX NO.	CONTRACTOR'S FEDERAL ID/SOC. SEC. NO.:	AGENCY APPROVAL (SIGNATURE & TITLE):
	CONTRACTOR'S LICENSE OR REGISTRATION NO.:	
	PROMPT PAYMENT DISCOUNT TERMS:	FUNDS AVAILABLE (SIGNATURE & TITLE):

1. This Field Purchase Order constitutes the Contractor's authority to furnish the item(s) in accordance with the terms of this Field Purchase Order, the Standard Field Purchase Order Terms and Conditions, the invitation for bids, and the Contractor's bid.
2. This Field Purchase Order is issued only at prices stated. No charges should be added for packing, reels, packages, or cartage unless specified on this order. Do not include any taxes in the price on the invoice. The Commonwealth is exempt from all Federal excise tax, and has registered with the Internal Revenue Service to make tax free purchases under Registration No. 23740001-K. The Commonwealth is also exempt from Pennsylvania state sales tax, local sales tax, public transportation assistance taxes and fees, and vehicle rental tax. No exemption certificates are required and none will be issued.
3. Delivery must be made by date specified. Items received by the Commonwealth are subject to inspection and, if found defective or not in accordance with specifications, will be returned at the Contractor's expense. All shipments must be made F.O.B. destination, with transportation charges prepaid by the Contractor and title passing upon proper delivery at the destination, unless otherwise specified. Quantities ordered must not be exceeded unless authority for small deviations is specified in this order. Truck deliveries will only be accepted during working hours.
4. The Contractor acknowledges and certifies, by proceeding with performance of this Field Purchase Order, that it is not currently under suspension or debarment by the Commonwealth of Pennsylvania, or any other state, or the federal government. If the Contractor cannot so certify, it must notify the Contact Person identified above and provide a written explanation of why such certification cannot be made, before proceeding with its performance under the Field Purchase Order. The Commonwealth reserves the right to cancel the Field Purchase Order without liability if the Contractor cannot so certify and the Contact Person is not satisfied with the explanation.
5. The Contractor agrees that the Commonwealth may set off the amount of any state tax liability or other obligation of the Contractor or its subsidiaries to the Commonwealth against any payments due the Contractor under this Field Purchase Order or any contract with the Commonwealth.
6. Send an itemized invoice to the "Bill To" address promptly upon shipment. Do not include in one invoice items on more than one Field Purchase Order. Show the Field Purchase Order number on all invoices, packages, delivery slips, and correspondence. The name of the shipper and car initials and number, if any, shall also be identified on all shipments.
7. Correspond with "Bill To" address concerning payment, not with the Department of General Services, unless it is the agency identified in the "Bill To" address.

[illegible]

This form is available on-line at www.dgs.state.pa.us/commod/forms/eval.doc



Multi-Award Contract #9985-05 Evaluation of Vendor Services

AGENCY INFORMATION

Agency Name: _____
 Agency Contact: _____ Telephone #: _____
 Agency Unit Using Services: _____
 Category: _____ Type: _____
 Vendor Name: _____
 Vendor Contact: _____ Telephone #: _____
 Project/Training Topic: _____
 Project/Training Date(s): _____

Rate the contracted vendor in the following areas. 1. Did not meet expectations; 2. Met expectations; 3. Exceeded expectations. If your agency received training or consulting in more than one contract category, please complete a separate evaluation for each category.

1. Vendor's philosophy and attitude toward your agency as a client. _____
2. Vendor's responsiveness and flexibility in meeting agency needs. _____
3. Vendor's ability to tailor programs relative to your agency practices and standards. _____
4. Vendor's estimation and actual performance based on projected cost of the project. _____
5. Effectiveness of vendor's training and/or consulting methodology relative to your objectives. _____
6. Rate the vendor's project plan against the stated outcomes. _____
7. Quality of the participant materials and training/consulting aids used by vendor. _____
8. Professional skills of the trainer(s)/consultant(s) representing the vendor. _____
9. Vendor's performance on providing adequate staffing, education and certification attributes and/or other resources needed for your project. _____
10. Vendor's ability to meet the objectives established for the training/consulting. _____
11. Vendor's overall performance on agency's specific project. _____

Additional Comments/Suggestions:

***This form should be completed on-line and
e-mailed to afultz@state.pa.us***