

## Notice of Contract Purchase Agreement



**State Of Rhode Island and Providence Plantations**  
**Department of Administration**  
**Division of Purchases**  
**One Capitol Hill**  
**Providence, RI 02908-5860**

|  |  |
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| <b>V<br/>E<br/>N<br/>D<br/>O<br/>R</b> | <b>UNIVERSITY OF RHODE ISLAND RESEARCH<br/>FOUNDATION<br/>DBA POLARIS MEP<br/>75 LOWER COLLEGE RD STE 209<br/>NORTH KINGSTON, RI 02881<br/>United States</b> |
|--|--|

| <b>LEAN PROCESS IMPROVEMENT<br/>SERVICES - MPA-486</b> |                                      |
|--|--------------------------------------|
| Award Number   | <b>3483243</b>                       |
| Revision Number  | <b>0</b>                             |
| Effective Period                                       | <b>01-SEP-2016 -<br/>31-AUG-2019</b> |
| Approved PO Date                                       | <b>06-SEP-2016</b>                   |
| Vendor Number  | <b>46540</b>                         |

|   |   |
|---|---|
| <b>S<br/>H<br/>I<br/>P<br/><br/>T<br/>O</b> | <b>MASTER PRICE AGREEMENT<br/>SEE BELOW<br/>RELEASE AGAINST, RI MPA<br/>United States</b> |
|---|---|

|                                    |                                    |
|------------------------------------|------------------------------------|
| Type of Requisition                | <b>ARCH, ENG &amp;<br/>CONSULT</b> |
| Requisition Number                 |                                    |
| Change Order<br>Requisition Number |                                    |
| Solicitation Number                | <b>CR-47</b>                       |
| Freight                            | <b>Paid</b>                        |
| Payment Terms                      | <b>NET 30</b>                      |
| Buyer                              | - <b>Walsh, Gail</b>               |
| Requester Name                     |                                    |
| Work Telephone                     |                                    |

This Purchase Order is issued pursuant to and in accordance with the terms and conditions of the solicitation and applicable federal, state, and local law, including the State of Rhode Island's purchasing regulations, available at [www.purchasing.ri.gov](http://www.purchasing.ri.gov).

CONTRACT TERM:  
9/1/16-8/31/19

WITH AN OPTION TO RENEW FOR (2) ONE-YEAR TERMS.

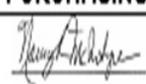
PROVIDE LEAN PROCESS IMPROVEMENT CONSULTING SERVICES IN ACCORDANCE WITH THE PROVISIONS OF CONTINUOUS RECRUITMENT #47/MPA-486. EXECUTIVE BRANCH AGENCIES WILL ACCESS SERVICES ONLY AFTER APPROVAL FROM THE LEAN REVIEW COMMITTEE ESTABLISHED BY THE DEPARTMENT OF ADMINISTRATION, AND ACQUISITION OF THREE QUOTES FROM QUALIFIED MPA VENDORS.

VENDOR PRICING IS ATTACHED.

### INVOICE TO

The State of Rhode Island accepts electronic invoices via its supplier portal. To register and submit electronic invoices, visit the supplier portal at <http://controller.admin.ri.gov/iSupplier/isup/index.php>

To submit paper invoices, mail to: Department of Administration Controller, One Capitol Hill, 4th Floor, Providence 02908.

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|--|
| <b>STATE PURCHASING AGENT</b>  |
| <br>Nancy R. McIntyre |

STATE AGENCY CONTACT:  
ANDREW MANCA  
(401) 574-8471  
ANDREW.MANCA@OMB.RI.GOV

SUPPLIER CONTACT:  
CHRISTIAN COWAN  
(401) 874-9003  
CCOWAN@POLARISMEP.ORG

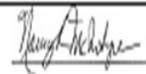
Reference Documents: CR-47 POLARIS MEP.pdf

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**STATE PURCHASING AGENT**



Nancy R. McIntyre

**Contract Terms and Conditions**

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## **Terms and Conditions**

### **PURCHASE ORDER STANDARD TERMS AND CONDITIONS**

### **TERMS AND CONDITIONS FOR THIS PURCHASE ORDER**

#### **PURCHASE AGREEMENT AWARD**

THIS IS A NOTICE OF AWARD, NOT AN ORDER. Any quantity reference in the agreement or in the bid preceding it are estimates only and do not represent a commitment on the part of the state to any level of billing activity, other than for quantities or volumes specifically released during the term. No action is to be taken except as specifically authorized, as described herein under AUTHORIZATION AND RELEASE. ENTIRE AGREEMENT - This NOTICE OF AWARD, with all attachments, and any release(s) against it shall be subject to: (1) the specifications, terms and conditions set forth in the Request/Bid Number cited herein, (2) the General Terms and Conditions of Contracts for the State of Rhode Island and (3) all provisions of, and the Rules and Regulations promulgated pursuant to, Title 37, Chapter 2 of the General Laws of the State of Rhode Island. This NOTICE shall constitute the entire agreement between the State of Rhode Island and the Vendor. No assignment of rights or responsibility will be permitted except with the express written permission of the State Purchasing Agent or his designee. CANCELLATION, TERMINATION and EXTENSION - This Price Agreement shall automatically terminate as of the date(s) described under CONTRACT PERIOD unless this Price Agreement is altered by formal amendment by the State Purchasing Agent or his designee upon mutual agreement between the State and the Vendor.

#### **AUTHORIZATION AND RELEASE**

In no event shall the Vendor deliver goods or provide service until such time as a duly authorized release document is certified by the ordering Agency. A Direct Purchase Order (DPO) shall be created by the agency listing the items ordered, using the pricing and format set forth in the Master Blanket. All pricing shall be as described in the Master Blanket and is considered to be fixed and firm for the term of the Agreement, unless specifically noted to the contrary herein. All prices include prepaid freight. Freight, taxes, surcharges, or other additional charges will not be honored unless reflected in Master Blanket.

#### **MULTI YEAR AWARD**

THIS IS A MULTI-YEAR BID/CONTRACT. PER RHODE ISLAND STATE LAW 37-2-33, CONTRACT OBLIGATIONS BEYOND THE CURRENT FISCAL YEAR ARE SUBJECT TO AVAILABILITY OF FUNDS. CONTINUATION OF THE CONTRACT BEYOND THE INITIAL FISCAL YEAR WILL BE AT THE DISCRETION OF THE STATE. TERMINATION MAY BE EFFECTED BY THE STATE BASED UPON DETERMINING FACTORS SUCH AS UNSATISFACTORY PERFORMANCE OR THE DETERMINATION BY THE STATE TO DISCONTINUE THE GOODS/SERVICES, OR TO REVISE THE SCOPE AND NEED FOR THE TYPE OF GOODS/SERVICES; ALSO MANAGEMENT OWNER DETERMINATIONS THAT MAY PRECLUDE THE NEED FOR GOODS/SERVICES.

#### **PARTIAL PAYMENTS**

PARTIAL OR PROGRESS PAYMENTS MAY BE MADE. PAYMENT WILL BE AUTHORIZED UPON RECEIPT AND ACCEPTANCE BY THE AGENCY OF THE PORTION OF THE CONTRACT OR PURCHASE ORDER COMPLETED BY THE VENDOR. PAYMENT UPON THE RENDERING OF A PROPERLY SUBMITTED INVOICE.

#### **CAMPAIGN FINANCE COMPLIANCE**

**CAMPAIGN FINANCE:** In accordance with RI General Law 17-27-2, Every person or business entity providing goods or services of \$5,000 or more, and has in the preceding 24 months, contributed an aggregate amount in excess of \$250 within a calendar year to any general officer, or candidate for general office, any member, or candidate for general assembly, or political party, is required to electronically file an affidavit regarding political contributions at:

<https://secure.ricampaignfinance.com/RhodeIslandCF/Public/VendorAffidavit.aspx>

#### **ARRA SUPPLEMENTAL TERMS AND CONDITIONS**

For contracts and sub-awards funded in whole or in part by the American Recovery and Reinvestment Act of 2009. Pub.L.No. 111-5 and any amendments thereto, such contracts and sub-awards shall be subject to the Supplemental Terms and Conditions For Contracts and Sub-awards Funded in Whole or in Part by the American Recovery and Reinvestment Act of 2009. Pub.L.No. 111-5 and any amendments thereto located on the Division of Purchases website at [www.purchasing.ri.gov](http://www.purchasing.ri.gov).

#### **DIVESTITURE OF INVESTMENTS IN IRAN REQUIREMENT:**

No vendor engaged in investment activities in Iran as described in R.I. Gen. Laws §37-2.5-2(b) may submit a bid proposal to, or renew a contract with, the Division of Purchases. Each vendor submitting a bid proposal or entering into a renewal of a contract is required to certify that the vendor does not appear on the list maintained by the General Treasurer pursuant to R.I. Gen. Laws §37-2.5-3.

For all Purchase Orders issued on behalf of the University of Rhode Island, Community College of Rhode Island, and Rhode Island College, vendors will receive a confirming order from the respective entity prior to proceeding.

#### **MPA BID AWARD (STATEWIDE APPLICABILITY)**

STATEWIDE APPLICABILITY - Political Subdivisions (cities, towns, schools, quasi-public agencies), as authorized by law, may participate in this Agreement. All ordering and billing shall be between the vendor and the political subdivision (only).

**STATE OF RHODE ISLAND**

**SOLICITATION:**

**CONTINUOUS RECRUITMENT #47**

**TITLE: LEAN PROCESS IMPROVEMENT SERVICES**

**POLARIS MEP – COST PROPOSAL**

**AUGUST 26, 2016**

| <b>CR-47 LEAN PROCESS IMPROVEMENT SERVICES - COST PROPOSAL – Polaris MEP</b> |                                |   |             |                  |
|--|--------------------------------|---|-------------|------------------|
| <b>LINE</b>  | <b>TITLE</b>                   | <b>DESCRIPTION</b>  | <b>UNIT</b> | <b>UNIT COST</b> |
| 1.1  | Facilitation Training DAY      | Promotion of team development, effective communication and dynamic problem solving skills. Participants will be self-assess strengths and weaknesses as facilitators.               | Day         | 1400             |
| 1.2  | Facilitation Training HALF DAY |   | ½ day       | 800              |
| 1.3  | Facilitation Training HOUR     |   | Hour        | 200              |
| 2.1  | General Training DAY           | Comprehensive overview of common tools and methodologies that are utilized to promote lean operations within an organization through hands on application.                          | Day         | 1400             |
| 2.2  | General Training HALF DAY      |   | ½ day       | 800              |
| 2.3  | General Training HOUR          |   | Hour        | 200              |
| 3.1  | 5S Training DAY                | Exploration of 5S, Value Added/Non Value Added processes and 8 Wastes can be utilized to identify and eliminate waste in the workplace.   | Day         | 1400             |
| 3.2  | 5S Training HALF DAY           |   | ½ day       | 800              |
| 3.3  | 5S Training HOUR               |   | Hour        | 200              |
| 4.1  | Value Stream Mapping DAY       | Introduction of value stream mapping to identify process “bottlenecks”. Participants will map high visibility business processes resulting in quantified improvement opportunities. | Day         | 1400             |
| 4.2  | Value Stream Mapping HALF DAY  |   | ½ day       | 800              |
| 4.3  | Value Stream Mapping HOUR      |   | Hour        | 200              |

|      |                                     |   |       |      |
|------|-------------------------------------|---|-------|------|
| 5.1  | Key Performance Indicators DAY      | Discussion of how cost, quality, delivery and safety impact a firm's ability to best meet the needs of its customers. Investigation of how to determine best methods of business performance measurement. | Day   | 1400 |
| 5.2  | Key Performance Indicators HALF DAY |   | ½ day | 800  |
| 5.3  | Key Performance Indicators HOUR     |   | Hour  | 200  |
| 6.1  | Training Standardization DAY        | Promotion of best practices for capturing "tribal knowledge" within the organization from knowledge silos to process robustness.  | Day   | 1400 |
| 6.2  | Training Standardization HALF DAY   |   | ½ day | 800  |
| 6.3  | Training Standardization HOUR       |   | Hour  | 200  |
| 7.1  | Kaizen Process DAY                  | Week-long events that coordinate cross functional teams to perform a deep-dive events to identify improvements that can be quickly implemented to improve material and information flow.                  | Day   | 1400 |
| 7.2  | Kaizen Process HALF DAY             |   | ½ day | 800  |
| 7.3  | Kaizen Process HOUR                 |   | Hour  | 200  |
| 8.1  | Lean Tool Support DAY               | Investigation of discrete application of lean tools based on business need. May include Total Productive Maintenance, Cellular Flow, Quick Changeover, Quality at Source, Batch Reduction, et al.         | Day   | 1400 |
| 8.2  | Lean Tool Support HALF DAY          |   | ½ day | 800  |
| 8.3  | Lean Tool Support HOUR              |   | Hour  | 200  |
| 9.1  | Communications Support DAY          | Investigation of effective communication strategies and how to best share information across various levels of the organization. Focus includes print and digital media, and visual workplace.            | Day   | 1400 |
| 9.2  | Communications Support HALF DAY     |   | ½ day | 800  |
| 9.3  | Communications Support HOUR         |   | Hour  | 200  |
| 10.1 | Train-the-Trainer Support DAY       | Discussion of skills necessary to effectively communicate information as subject matter experts to promote necessary knowledge within their work areas.   | Day   | 1400 |

|      |                                      |  |       |      |
|------|--------------------------------------|--|-------|------|
| 10.2 | Train-the-Trainer Support HALF DAY   |  | ½ day | 800  |
| 10.3 | Train-the-Trainer Support HOUR       |  | Hour  | 200  |
| 11.1 | Lean Six Sigma DAY                   | Introduction to concepts of the Lean Six Sigma methodology including DMAIC methodology and overview of certification through completion of “Green Belt” and “Black Belt” projects.                 | Day   | 1400 |
| 11.2 | Lean Six Sigma HALF DAY              |  | ½ day | 800  |
| 11.3 | Lean Six Sigma HOUR                  |  | Hour  | 200  |
| 12.1 | Strategic Business Planning DAY      | Investigation of how strategy can help a firm meet performance goals. Discussion of how to form an effective strategic business plan and how to assess organizational strengths and weaknesses     | Day   | 1400 |
| 12.2 | Strategic Business Planning HALF DAY |  | ½ day | 800  |
| 12.3 | Strategic Business Planning HOUR     |  | Hour  | 200  |
| 13.1 | Team Building DAY                    | Characterization of successful organizations through the ability to build and promote effective teams at all levels of the organization.   | Day   | 1400 |
| 13.2 | Team Building HALF DAY               |  | ½ day | 800  |
| 13.3 | Team Building HOUR                   |  | Hour  | 200  |
| 14.1 | Lean Safety DAY                      | Exploration of preventative strategies to reduce business risk by reducing and eliminating hazards Discussion of best practices to reduce rates of total recordable incidences and lost work days. | Day   | 1400 |
| 14.2 | Lean Safety HALF DAY                 |  | ½ day | 800  |
| 14.3 | Lean Safety HOUR                     |  | Hour  | 200  |

## DESCRIPTION OF TRAINING PROGRAMS INCLUDED IN COST PROPOSAL:

Facilitation Training – This course is intended to promote team development, effective communication and dynamic problem solving skills. Participants will be challenged by assessing strengths and weaknesses within their own abilities to perform as facilitators.

General Training – This course is intended to provide a comprehensive overview of common tools and methodologies that are utilized to promote lean operations within an organization. Participants will

demonstrate understanding through hands-on application aimed at contextualizing understanding for a cross-functional audience.

5S training – This course is intended to promote effectiveness by systematically identifying and eliminating wasteful practices in the workplace. Participants will learn concepts of 5S, Value Added/Non Value Added processes and 8 Wastes and how they can be used to improve efficiency in the workplace.

Value Stream Mapping – This course is intended to introduce value stream mapping as a tool that can help individuals and organizations identify process “bottlenecks”. Participants will Value Stream Mapping business processes result in quantified improvement opportunities that derive the maximum business impact.

Key Performance Indicators – This course is intended to discuss how key performance indicators can be leveraged as a business strategy to connect contribution of individual performers with the success of the business. Participants will discuss how effective performance measurement associated to cost, quality, delivery and safety a firm’s ability to best meet the needs of its customers.

Training Standardization – This course is intended to promote best practices for capturing “tribal knowledge” within the organization by shifting reliance on knowledge silos to process robustness. Participants will understand necessary elements for effective work standards, methods of communication and strategies to continually improve work methods to best current methods.

Kaizen Process – Kaizen is a Japanese term that means “change for the better.” Kaizen events are organized as week-long events that coordinate cross functional teams to perform a deep-dive identifying improvements that can be quickly implemented to improve material and information flow within a work area.

Activities that will occur over a 5 day time period include “current state” performance documentation (Day 1), “current state” evaluation/assessment for improvement (Day 2), characterization of “future state;” plan to address performance gaps (Day 3), implement changes to achieve desired “future state” (Day 4), and quantify outcomes and impacts of “future state” changes, review event debriefing and lessons learned (Day 5).

Lean Tool Support - This course is intended to prepare participant work teams within Lean operational frameworks to achieve best in class business results for departmental and organizational initiatives. Participants will work under facilitated guidance to address stated business needs established by organizational leadership into meaningful project implementation plans that highlight advanced application of Lean Tools methodologies.

Communications Support -This course is intended to prepare individuals to excel as skilled communicators within their work areas. Participants will be challenged through self-analysis of communication habits and will discuss how different styles and methods of sharing information can create different results when interacting with tendencies of different personality archetypes.

Train-the-Trainer - This course is intended to prepare individuals with the skills necessary to effectively communicate information as subject matter experts to promote necessary knowledge within their work areas. Participants will be explore tools necessary to catalyze improvement within team members through effective learning pursuant of business goals.

Lean 6-Sigma – This course is intended to introduce concepts of the Lean Six Sigma methodology including application of DMAIC improvement philosophy and how participants can pursue certification through the structured completion of “Green Belt” and “Black Belt” projects.

Strategic Business Planning – This course is intended to investigate how clear organizational strategy can help a firm align its operation to meet top-level performance goals. Participants will discuss how to form an effective strategic business plan as well as how to develop comprehensive understanding of strengths and weaknesses within their organization.

Team Building – This course is intended to characterize elements of what makes organizations successful through their ability to build and promote effective team building at all levels of the organization.

Lean Safety – This course is intended to explore preventative strategies that reduce a firm’s exposure to business risk through the reduction and elimination of safety hazards within the workplace. Participants will discuss best practices that reduce rates of total recordable incidences and lost work days and identify how to document and control areas of risk within their organizations.

This Cost Proposal is submitted for:

Polaris MEP  
315 Iron Horse Way  
Providence, RI 02908

Phone: 401-270-8896

Contact: Christian Cowan  
Center Director  
[ccowan@polarismep.org](mailto:ccowan@polarismep.org)

Signed: \_\_\_\_\_  
Christian Cowan, Center Director

Date: \_\_\_\_\_