



# RI Purchase Agreement Amendment Report

STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS  
 ONE CAPITOL HILL  
 PROVIDENCE RI 02908

WORLD EDUCATION INC  
 44 FARNSWORTH ST  
 BOSTON, MA 02210  
 United States

Amendment Date: 01-JUL-15  
 Original Award Date: 21-JUN-12  
 Buyer: G Walsh  
 Phone #:  
 FOB: Destination  
 Terms: NET 30  
 Vendor # 27271

<b>S H I P T O</b>	MASTER PRICE AGREEMENT SEE BELOW RELEASE AGAINST, RI MPA United States	<b>I N V O I C E</b>	Change Order Number 1 Award Number <b>3281739</b> Effective Period <b>01-JUL-12 - 30-JUN-16</b>	MASTER PRICE AGREEMENT SEE BELOW RELEASE AGAINST, RI MPA United States
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TECHNICAL ASSISTANCE AND SUPPORT SERVICES - RIDE (MPA-210)

Description			Bid Number	Change Order Req#	
TECHNICAL ASSISTANCE AND SUPPORT SERVICES - RIDE (MPA-210)				EIDE15NMC-0057	
Line #	Code	Class-Item	Quantity	Unit	Unit Price
		CHANGE TO PO 3281739  CHANGE EFFECTIVE PERIOD:  FROM: 7/1/12 - 6/30/15 TO: 7/1/12 - 6/30/16			

<b>STATE PURCHASING AGENT</b>
 Nancy R. McIntyre



# Notice of Blanket Purchase Agreement

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TECHNICAL ASSISTANCE AND SUPPORT  
 SERVICES - RIDE (MPA #210)

**Award Number**  
3281739

**Effective Period:**  
01-JUL-12 - 30-JUN-15

S H I P P I N G	MASTER PRICE AGREEMENT SEE BELOW RELEASE AGAINST, RI MPA United States	<b>Date:</b> 21-JUN-12 <b>Buyer:</b> G Walsh <b>Shipping:</b> Paid <b>Terms:</b> NET 30 <b>Vendor #</b> 27271	I N V O I C E	MASTER PRICE AGREEMENT SEE BELOW RELEASE AGAINST, RI MPA United States

Department		Type of Requisition	Bid Number	Requisition Number
		MPA-210	7449122 <del>N/A</del>	1245204
Line	Item	Item Description	Unit	Unit Price

		7/1/12 - 6/30/15  MASTER PRICE AGREEMENT #210  WITH AN OPTION TO RENEW FOR UP TO TWELVE (12) MONTHS.  TECHNICAL ASSISTANCE AND SUPPORT SERVICES - RI DEPT. OF EDUCATION, IN ACCORDANCE WITH THE PROVISIONS OF RFP #7449122; THE 11/10/11 PROPOSAL SUBMITTED BY WORLD EDUCATION, INC; AND THE STATE OF RHODE ISLAND'S GENERAL CONDITIONS OF PURCHASE.  AT THE TIME THAT A PROJECT IS AWARDED, SUPPLIER WILL BE REQUESTED TO FURNISH WITHIN TEN (10) DAYS THE FOLLOWING DOCUMENTS:  1. SIGNED AGREEMENT BETWEEN SUPPLIER AND THE RI DEPT. OF EDUCATION 2. EQUAL EMPLOYMENT OPPORTUNITY COMPLIANCE 3. MINORITY BUSINESS ENTERPRISE COMPLIANCE OR WAIVER 4. CERTIFICATE OF INSURANCE.  PRICING QUOTED HEREIN IS MAXIMUM PRICING FOR THE TERM OF THE CONTRACT AND MAY BE NEGOTIATED DOWNWARD AT THE TIME A PROJECT IS AWARDED.		
1		MPA-210 - 7/1/12-6/30/13 - VICE PRESIDENT - SALARY & FRINGE BENEFITS	Hour	103.5
2		MPA-210 - 7/1/12-6/30/13 - DIRECTOR - SALARY & FRINGE BENEFITS	Hour	88
3		MPA-210 - 7/1/12-6/30/13 - ADULT EDUCATION SPECIALIST(1) - SALARY &	Hour	62.1

**STATE PURCHASING AGENT**

*Lorraine A. Hynes*

Lorraine A. Hynes



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TECHNICAL ASSISTANCE AND SUPPORT  
SERVICES - RIDE (MPA #210)

Award  
Number  
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Effective Period:  
01-JUL-12 - 30-JUN-15

SHIP TO	MASTER PRICE AGREEMENT SEE BELOW RELEASE AGAINST,RI MPA United States	Date: 21-JUN-12 Buyer: G Walsh Shipping: Paid Terms: NET 30 Vendor #: 27271	INVOICE	MASTER PRICE AGREEMENT SEE BELOW RELEASE AGAINST,RI MPA United States

Department		Type of Requisition	Bid Number	Requisition Number
			N/A	
Line	Item	Item Description	Unit	Unit Price

		FRINGE BENEFITS		
4		MPA-210 - 7/1/12-6/30/13 - ADULT EDUCATION SPECIALIST(2) - SALARY & FRINGE BENEFITS	Hour	62.1
5		MPA-210 - 7/1/12-6/30/13 - ADULT EDUCATION SPECIALIST(3) - SALARY & FRINGE BENEFITS	Hour	62.1
6		MPA-210 - 7/1/12-6/30/13 - INSTRUCTIONAL TECHNOLOGIST & WEBSITE DEVELOPER - SALARY & FRINGE BENEFITS	Hour	62.1
7		MPA-210 - 7/1/12-6/30/13 - ADULT EDUCATION SPECIALIST(4) - SALARY & FRINGE BENEFITS	Hour	62.1
8		MPA-210 - 7/1/12-6/30/13 - ADULT EDUCATION SPECIALIST(5) - SALARY & FRINGE BENEFITS	Hour	77.65
9		MPA-210 - 7/1/12-6/30/13 - ADULT EDUCATION SPECIALIST(6) - SALARY & FRINGE BENEFITS	Hour	67
10		MPA-210 - 7/1/12-6/30/13 - ADULT EDUCATION SPECIALIST(7) - SALARY & FRINGE BENEFITS	Hour	62.1
11		MPA-210 - 7/1/12-6/30/13 - CONSULTANT - GRAPHIC DESIGNER	Hour	103.5
12		MPA-210 - 7/1/12-6/30/13 - CONSULTANT - EVALUATION SPECIALIST	Hour	103.5
13		MPA-210 - 7/1/12-6/30/13 - CONSULTANT - NUMERACY SPECIALIST(1)	Hour	103.5
14		MPA-210 - 7/1/12-6/30/13 - CONSULTANT - TRANSITIONS SPECIALIST	Hour	103.5
15		MPA-210 - 7/1/12-6/30/13 - CONSULTANT - NUMERACY SPECIALIST(2)	Hour	103.5
16		MPA-210 - 7/1/12-6/30/13 - TRAVEL	Each	1
17		MPA-210 - 7/1/12-6/30/13 - HOTEL AND PER DIEM	Each	1
18		MPA-210 - 7/1/12-6/30/13 - EDUCATION SUPPLIES AND MATERIALS	Each	1
19		MPA-210 - 7/1/12-6/30/13 - INDIRECT COSTS 38.85%	Each	1
20		MPA-210 - 7/1/13-6/30/14 - VICE PRESIDENT - SALARY & FRINGE BENEFITS	Hour	107.15

STATE PURCHASING AGENT

Lorraine A. Hynes

This Notice of Award/Purchase Order is issued in accordance with the specific requirements described herein and the State's Purchasing Regulations and General Conditions of Purchase, copies of which are available at [www.purchasing.ri.gov](http://www.purchasing.ri.gov). Delivery of goods or services as described herein shall be deemed acceptance of these requirements.



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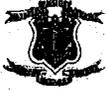
Department		Type of Requisition	Bid Number	Requisition Number
Line	Item	Item Description	Unit	Unit Price

21		MPA-210 - 7/1/13-6/30/14 - DIRECTOR - SALARY & FRINGE BENEFITS	Hour	91.1
22		MPA-210 - 7/1/13-6/30/14 - ADULT EDUCATION SPECIALIST(1) - SALARY & FRINGE BENEFITS	Hour	64.3
23		MPA-210 - 7/1/13-6/30/14 - ADULT EDUCATION SPECIALIST(2) - SALARY & FRINGE BENEFITS	Hour	64.3
24		MPA-210 - 7/1/13-6/30/14 - ADULT EDUCATION SPECIALIST(3) - SALARY & FRINGE BENEFITS	Hour	64.3
25		MPA-210 - 7/1/13-6/30/14 - INSTRUCTIONAL TECHNOLOGIST & WEBSITE DEVELOPER - SALARY & FRINGE BENEFITS	Hour	64.3
26		MPA-210 - 7/1/13-6/30/14 - ADULT EDUCATION SPECIALIST(4) - SALARY & FRINGE BENEFITS	Hour	64.3
27		MPA-210 - 7/1/13-6/30/14 - ADULT EDUCATION SPECIALIST(5) - SALARY & FRINGE BENEFITS	Hour	80.4
28		MPA-210 - 7/1/13-6/30/14 - ADULT EDUCATION SPECIALIST(6) - SALARY & FRINGE BENEFITS	Hour	69.35
29		MPA-210 - 7/1/13-6/30/14 - ADULT EDUCATION SPECIALIST(7) - SALARY & FRINGE BENEFITS	Hour	64.3
30		MPA-210 - 7/1/13-6/30/14 - CONSULTANT - GRAPHIC DESIGNER	Hour	107.15
31		MPA-210 - 7/1/13-6/30/14 - CONSULTANT - EVALUATION SPECIALIST	Hour	107.15
32		MPA-210 - 7/1/13-6/30/14 - CONSULTANT - NUMERACY SPECIALIST(1)	Hour	107.15
33		MPA-210 - 7/1/13-6/30/14 - CONSULTANT - TRANSITIONS SPECIALIST	Hour	107.15
34		MPA-210 - 7/1/13-6/30/14 - CONSULTANT - NUMERACY SPECIALIST(2)	Hour	107.15
35		MPA-210 - 7/1/13-6/30/14 - TRAVEL	Each	1
36		MPA-210 - 7/1/13-6/30/14 - HOTEL AND PER DIEM	Each	1
37		MPA-210 - 7/1/13-6/30/14 - EDUCATION SUPPLIES AND MATERIALS	Each	1

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Department		Type of Requisition	Bid Number	Requisition Number
			N/A	
Line	Item	Item Description	Unit	Unit Price

38		MPA-210 - 7/1/13-6/30/14 - INDIRECT COSTS 38.85%	Each	1
39		MPA-210 - 7/1/14-6/30/15 - VICE PRESIDENT - SALARY & FRINGE BENEFITS	Hour	110.9
40		MPA-210 - 7/1/14-6/30/15 - DIRECTOR - SALARY & FRINGE BENEFITS	Hour	94.3
41		MPA-210 - 7/1/14-6/30/15 - ADULT EDUCATION SPECIALIST(1) - SALARY & FRINGE BENEFITS	Hour	66.55
42		MPA-210 - 7/1/14-6/30/15 - ADULT EDUCATION SPECIALIST(2) - SALARY & FRINGE BENEFITS	Hour	66.55
43		MPA-210 - 7/1/14-6/30/15 - ADULT EDUCATION SPECIALIST(3) - SALARY & FRINGE BENEFITS	Hour	66.55
44		MPA-210 - 7/1/14-6/30/15 - INSTRUCTIONAL TECHNOLOGIST & WEBSITE DEVELOPER - SALARY & FRINGE BENEFITS	Hour	66.55
45		MPA-210 - 7/1/14-6/30/15 - ADULT EDUCATION SPECIALIST(4) - SALARY & FRINGE BENEFITS	Hour	66.55
46		MPA-210 - 7/1/14-6/30/15 - ADULT EDUCATION SPECIALIST(5) - SALARY & FRINGE BENEFITS	Hour	83.25
47		MPA-210 - 7/1/14-6/30/15 - ADULT EDUCATION SPECIALIST(6) - SALARY & FRINGE BENEFITS	Hour	71.8
48		MPA-210 - 7/1/14-6/30/15 - ADULT EDUCATION SPECIALIST(7) - SALARY & FRINGE BENEFITS	Hour	66.55
49		MPA-210 - 7/1/14-6/30/15 - CONSULTANT - GRAPHIC DESIGNER	Hour	110.9
50		MPA-210 - 7/1/14-6/30/15 - CONSULTANT - EVALUATION SPECIALIST	Hour	110.9
51		MPA-210 - 7/1/14-6/30/15 - CONSULTANT - NUMERACY SPECIALIST(1)	Hour	110.9
52		MPA-210 - 7/1/14-6/30/15 - CONSULTANT - TRANSITIONS SPECIALIST	Hour	110.9
53		MPA-210 - 7/1/14-6/30/15 - CONSULTANT - NUMERACY SPECIALIST(2)	Hour	110.9
54		MPA-210 - 7/1/14-6/30/15 - TRAVEL	Each	1

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Department		Type of Requisition	Bid Number	Requisition Number
			N/A	
Line	Item	Item Description	Unit	Unit Price

55		MPA-210 - 7/1/14-6/30/15 - HOTEL AND PER DIEM	Each	1
56		MPA-210 - 7/1/14-6/30/15 - EDUCATION SUPPLIES AND MATERIALS	Each	1
57		MPA-210 - 7/1/14-6/30/15 - INDIRECT COSTS 38.85%	Each	1
58		MPA-210 - 7/1/15-6/30/16 - VICE PRESIDENT - SALARY & FRINGE BENEFITS	Hour	114.8
59		MPA-210 - 7/1/15-6/30/16 - DIRECTOR - SALARY & FRINGE BENEFITS	Hour	97.6
60		MPA-210 - 7/1/15-6/30/16 - ADULT EDUCATION SPECIALIST(1) - SALARY & FRINGE BENEFITS	Hour	68.9
61		MPA-210 - 7/1/15-6/30/16 - ADULT EDUCATION SPECIALIST(2) - SALARY & FRINGE BENEFITS	Hour	68.9
62		MPA-210 - 7/1/15-6/30/16 - ADULT EDUCATION SPECIALIST(3) - SALARY & FRINGE BENEFITS	Hour	68.9
63		MPA-210 - 7/1/15-6/30/16 - INSTRUCTIONAL TECHNOLOGIST & WEBSITE DEVELOPER - SALARY & FRINGE BENEFITS	Hour	68.9
64		MPA-210 - 7/1/15-6/30/16 - ADULT EDUCATION SPECIALIST(4) - SALARY & FRINGE BENEFITS	Hour	68.9
65		MPA-210 - 7/1/15-6/30/16 - ADULT EDUCATION SPECIALIST(5) - SALARY & FRINGE BENEFITS	Hour	86.2
66		MPA-210 - 7/1/15-6/30/16 - ADULT EDUCATION SPECIALIST(6) - SALARY & FRINGE BENEFITS	Hour	74.3
67		MPA-210 - 7/1/15-6/30/16 - ADULT EDUCATION SPECIALIST(7) - SALARY & FRINGE BENEFITS	Hour	68.9
68		MPA-210 - 7/1/15-6/30/16 - CONSULTANT - GRAPHIC DESIGNER	Hour	114.8
69		MPA-210 - 7/1/15-6/30/16 - CONSULTANT - EVALUATION SPECIALIST	Hour	114.8
70		MPA-210 - 7/1/15-6/30/16 - CONSULTANT - NUMERACY SPECIALIST(1)	Hour	114.8
71		MPA-210 - 7/1/15-6/30/16 - CONSULTANT - TRANSITIONS SPECIALIST	Hour	114.8

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Department		Type of Requisition	Bid Number	Requisition Number
			N/A	
Line	Item	Item Description	Unit	Unit Price

72		MPA-210 - 7/1/15-6/30/16 - CONSULTANT - NUMERACY SPECIALIST(2)	Hour	114.8
73		MPA-210 - 7/1/15-6/30/16 - TRAVEL	Each	1
74		MPA-210 - 7/1/15-6/30/16 - HOTEL AND PER DIEM	Each	1
75		MPA-210 - 7/1/15-6/30/16 - EDUCATION SUPPLIES AND MATERIALS	Each	1
76		MPA-210 - 7/1/15-6/30/16 - INDIRECT COSTS 38.85%		
		AGENCY CONTACT: KRISTEN COLE - (401) 222-4681  SUPPLIER CONTACT: SALLY WALDRON - (617) 482-9485 FAX # (617) 482-0617	Each	1

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**TECHNICAL PROPOSAL**  
World Education, Inc.  
Division of Accelerating School Performance  
Office of Multiple Pathways  
Adult Education

World Education, Inc. (WEI), a Boston-based non-profit organization, is applying to provide technical assistance and support services to the Rhode Island Department of Education, Division of Accelerating School Performance, Office of Multiple Pathways, Adult Education. With more than 60 years of experience in adult education, WEI has the expertise in professional development, qualitative research, case studies, development and support of websites and web-based toolkits, proposal development, report writing, technical assistance, evaluation, and adult education content. Our areas of content expertise in adult education include reading, writing, numeracy, GED preparation and high school completion, college and career readiness, assessment, curriculum development, content standards development, professional standards development, and system and organizational design.

Adult education faces a considerable challenge in equipping increasing numbers of adult U.S.-born and English language learners with 21<sup>st</sup> century skills as workers, parents and community members. Every nine seconds a high school student drops out of school (American Youth Policy Forum, 2010). According to the U.S. Office of Vocational and Adult Education (National Assessment of Adult Literacy, 2003), they join over 90 million adults in the U.S. who lack basic skills. Without further education and training, the vast majority of these young adults and their older counterparts face low-paying jobs with few pathways for advancement.

Preparing adults to enter and succeed in further education, training, and employment requires a service delivery system that accelerates learning, is aligned in a pathway that is transparent to the end-users, and is able to track and evaluate its outcomes. WEI's recent study of the policies and practices of 17 states' adult education systems for the Bill & Melinda Gates Foundation, including Rhode Island, indicates that such systems do not yet exist, but they are being developed (*Postsecondary Success Of Young Adults: System Impact Opportunities In Adult Education, NCTN/ World Education, 2010*).

There is a growing body of national and regional system reform efforts aimed at obtaining improved outcomes for adult learners. Rhode Island adult education has been involved in many of these efforts, such as performance-based funding, Teachers Investigating Adult Numeracy, the New England Learner Persistence Project, and the New England ABE-to-College Transition project, the latter two developed and managed by WEI.

These reform efforts are hampered by structural underfunding of adult education. In most states, when a young adult leaves high school and enrolls in adult education, the value placed on his or her education drops six-fold or more, although both systems share the goal of graduating the young person with a secondary credential. A key structural challenge for adult education, then, is securing adequate

funding to pay for higher intensity, multiple pathway programs that provide life and career counseling and other wraparound supports that enable adults' participation in education.

A related structural challenge is the need to build a stable, well-trained teacher corps. While adult education is placing increased emphasis on teacher quality (including professional standards, licensure, pre-service and in-service training), there is less focus, to date, on improving the working conditions of adult education teachers, counselors and administrators, the majority of whom are part-time and lack benefits. In spite of often poor working conditions, adult education providers demonstrate remarkable dedication to their students and willingness to learn new instructional approaches and technologies. New learning technologies offer unprecedented opportunities for adult learners to practice their skills outside of class and accelerate their learning. Increasing numbers of adults are raising their aspirations to continue beyond ABE to postsecondary education and training. The issue for the field of adult education continues to be how to offer these adults the most efficient and engaging learning opportunities that help them meet their goals.

## **Organizational Capacity**

### History, Goals, and Key Achievements

Founded in 1951, World Education, Inc. (WEI) is a private, non-profit organization dedicated to improving the lives of the poor through education and social and economic development programs. The mission of the U.S. Division of WEI is to strengthen the effectiveness of educators, organizations and systems to support adults, older youth, and communities to thrive. Our vision is that all undereducated adults achieve a level of education that secures them access to family-sustaining livelihoods, health care, housing, and a safe environment, and that prepares them to be active members of their communities.

Key achievements of the U.S. Division of WEI include:

- Coordination and leadership of the System for Adult Basic Education Support (SABES) [www.sabes.org](http://www.sabes.org), the professional development initiative for Massachusetts adult education programs and staff.
- Coordination and leadership of the New England Literacy Resource Center [www.nelrc.org](http://www.nelrc.org), an adult education capacity-building partnership of the six New England states, including Rhode Island.
- Creation and leadership of the National College Transition Network [www.collegetransition.org](http://www.collegetransition.org), a national, 2,500 member organization of educators, administrators, policy makers, and researchers interested in strengthening policy and practice related to college and career readiness of adult learners. NCTN works with adult education programs, professional development providers, and policy makers to enable adult learners to succeed in postsecondary education

that leads to jobs with family sustaining wages. For the past five years, the NCTN has held its annual, national conference in Rhode Island.

- From 1996 to 2007, WEI partnered with the National Center for the Study of Adult Learning and Literacy (NCSALL) at Harvard University to publish and disseminate the Center's research and create professional development for the adult literacy field based on the Center's findings. In addition, WEI conducted two research studies, the first on adult multiple intelligences and the second on professional development for adult education. [www.ncsall.net](http://www.ncsall.net).
- For the National Institute for Literacy and the U.S. Department of Education, Office of Vocational and Adult Education, WEI completed an extensive revision of the interactive teacher education website, Assessment Strategies and Reading Profiles (ASRP) <http://lincs.ed.gov/readingprofiles/index.htm>.
- WEI has developed numerous online professional development courses for adult educators offered on our online learning platform, ProfessionalStudiesAE.org. Courses include a series on assessment, a series on numeracy, and courses on multiple intelligences, differentiated instruction, and transitions to college and careers.

Nearly all WEI U.S. Division staff are former adult basic education teachers and program directors. We are committed to maintaining close ties with field members at every level – learners, practitioners, program directors, state and national policy makers, and researchers, accomplishing this through conferences and collaborations, hands-on projects, and the extensive use of web-based media. WEI has experience with website design, video production, online course development for practitioners and learners, and using social media such as Ning, wiggio, Facebook, and web conferencing to facilitate learning.

### Structure and Programs

WEI is organized in three divisions: U.S., Africa, and Asia, each headed by a Vice President supported by Accounting, Human Resources, IT, and Development departments. An organizational chart that lists sample projects for each division is included with the attachments. With an annual budget of \$30 million and current projects in more than 20 countries, WEI has demonstrated experience and proven systems for leading and managing projects ranging in content, size, and scope.

### **Relevant Experience and Expertise**

#### Experience and Expertise in Areas in Which Services Will Be Offered

By virtue of its experience and expertise, WEI is well-qualified to offer our services to the Office of Multiple Pathways in the following areas, listed below with our relevant experience briefly noted:

- *Quantitative longitudinal and qualitative/case study analyses* – WEI researcher John Strucker has directed a four-state longitudinal research project and several national and international quantitative studies in adult literacy. WEI’s National College Transition Network senior staff conducted a study of 17 states’ adult education policy and practice related to college transitions and completion for the Bill & Melinda Gates Foundation. WEI Vice-President Sally Waldron and staff members Silja Kallenbach and Andy Nash have conducted qualitative/case studies at the local, state, and regional level.
- *System and organizational development consulting* – WEI staff (Carey Reid and Luanne Teller) provide technical assistance to low-performing adult learning centers in Massachusetts, much of which is focused on organization development. Silja Kallenbach provides organization development consulting and facilitated a nine-month strategic planning process for the Rhode Island Family Literacy Initiative (RIFLI) funded by New Roots Providence.
- *Website development including content and design* – WEI staff members Steve Quann, Kaye Beall, and John Strucker have experience in website development, including both website content and design for adult literacy professional development; Quann has additional experience in web content and design and distance learning applications for English Language Learners and transition students.
- *Proposal development and report writing* – Led by Waldron and Kallenbach, WEI staff has extensive experience writing and winning proposals from various U.S. Department of Education (U.S. ED) offices including the Institute for Education Sciences, the Office of Vocational and Adult Education, and the National Institute for Literacy. WEI has also been successful in winning ongoing funding from the Commonwealth of Massachusetts and other New England State Departments of Education, as well as private funding from such sources as the Bill & Melinda Gates Foundation, Lumina Foundation for Education, The Boston Foundation, Jane’s Trust, the Carl & Ruth Shapiro Foundation, the Nellie Mae Education Foundation, Verizon, and State Street Foundation.
- *Facilitation/ coordination services* - Several WEI staff (e.g. Kallenbach, Waldron, Andy Nash, and Sandy Goodman) facilitate multi-stakeholder processes, often as part of multi-state projects. Kallenbach facilitated the Adult & Family Literacy Cluster of nine programs upon the request of the Nellie Mae Education Foundation for ten years; Dorcas Place and Rhode Island Family Literacy Initiative participated in this Cluster.
- *Professional development providers* – Since 1990, WEI has been responsible, in partnership with five Regional Support Centers with funding from the Massachusetts Department of Elementary and Secondary Education, for organizing and delivering professional development for Massachusetts adult educators and programs. WEI also directs the New England Literacy Resource Center that provides professional development for adult educators in the region. In addition, WEI staff members Waldron, Strucker, Kallenbach, Quann, Nash, Teller, and Reid have designed and delivered professional development in

numerous content areas for adult education staff in dozens of other U.S. states and abroad. Andy Nash has assisted adult educators in several states, including Rhode Island, in developing and implementing ELL content standards.

- *Technical assistance writers* –WEI staff members Reid, Strucker, Waldron, Nash, Teller, Kallenbach, Beall, and Goodman have extensive technical writing experience in adult education, employing both print and web-based media; products have included training manuals, evaluation checklists, curriculum standards and benchmarks, questionnaires, literature reviews, and research reports for U.S. ED and state education agencies in Massachusetts, Ohio, California, Pennsylvania, and Texas.
- *Support for websites and web-based toolkits* – WEI staff members Beall, Reid, Goodman, and Strucker have developed and delivered hands-on workshops and created toolkits of printed resources and evaluation tools to support web-based adult education professional development and certification initiatives.
- *Content specialists* – WEI staff includes content specialists in the following areas: Waldron (evaluation, math, professional development, system development); Strucker (reading, assessment); Kallenbach (ELL, professional development, learner persistence, organization development, multiple intelligences, evaluation); Nash (curriculum and standards development, ELL, learner persistence, workplace education, civic engagement); Quann (ELL, health literacy, distance learning, workforce education); Reid (reading, adult development, assessment, licensure); Beall (reading, assessment, distance learning, professional development, volunteer management); Goodman (transitions to college and careers, career planning, workforce education); Teller (professional development, ELL, transitions to college and careers). To supplement staff members' skills and content knowledge, WEI maintains a network of expert consultants.

As detailed below, WEI staff members also possess suitable expertise and a willingness to provide services in the following areas:

- *Training in research and evaluation design* – John Strucker received his doctorate in reading from the Harvard Graduate School of Education; he has published papers and chapters in a range of peer-reviewed research publications and given academic presentations at numerous national and international professional conferences on adult literacy research. As Co-Principal Investigators for the Adult Multiple Intelligences Study and the Health Education and Adult Literacy Study, Kallenbach and Waldron respectively have training in research design.
- *Demonstrated research and evaluation experience* – WEI Vice-President Sally Waldron and Division Director Silja Kallenbach have led state-wide program evaluation studies of adult education professional development systems, career pathways, and youth in transition projects in Pennsylvania and Ohio, and have contributed to developing U.S. ED's research agenda for adult education. John Strucker has conducted a number of large-scale research studies in adult literacy,

trained doctoral students in quantitative and qualitative research methods at Harvard University, and provided research advice to various agencies of U.S. ED and the National Academy of Sciences.

- *Demonstrated proposal development experience* – Since WEI is a nonprofit organization funded by government and private grants, several WEI staff have experience designing and writing successful funding proposals. Our shared experience and expertise enables us to keep each other apprised of upcoming funding opportunities, and WEI staff frequently collaborate on proposal writing efforts under the direction of Waldron and Kallenbach. Both have provided training on fundraising and grant writing. Waldron and Kallenbach also possess specialized expertise in cost analysis and budget design.
- *Training and/or extensive experience in website design* – Steve Quann has extensive training in website design, website maintenance, web video, social media, and online instructional design. Among his most recent web designs are the National Institute for Literacy's *Assessment Strategies and Reading Profiles (ASRP)* website, <http://lincs.ed.gov/readingprofiles/index.htm> for ABE teachers and the *Health Care Learning Network* website, <http://www.hcln.org/> for entry-level health care workers who wish to become health care professionals. In this work, Quann is often assisted by Beall, Strucker, Waldron, and in-house graphic designer, Marina Blanter.
- *Substantive knowledge of adult education content and extensive writing experience for the development of website content* – John Strucker and WEI consultant Dr. Rosalind Davidson created all of the content for the above-mentioned ASRP website, covering adult reading theory, diagnostic assessment, and teaching suggestions and resources. In addition to designing the HCLN website, Quann collaborated with WEI consultant Diana Satin to write the content for the Project Care website, <http://projectcare.worlded.org>, a health-related website for English Language Learners. Kaye Beall leads WEI's *online professional development* team (that includes Waldron, Quann, Reid, and Strucker) which has created teacher education courses in numerous areas of adult education for the Commonwealth of MA, the National College Transition Network, ProLiteracy, and U.S. ED *LINCS* Initiative.
- *Website management, support, revision* – As noted above, Steve Quann possesses this skill-set and has performed those functions for numerous WEI-created websites.
- *Highly skilled in written and oral communications* – Several WEI staff are seasoned writers of articles, reports, studies, and sourcebooks, most of which WEI disseminates. WEI's Cynthia Zafft and Silja Kallenbach regularly present keynote addresses at adult education conferences, and all WEI professional staff members provide polished presentations. We are also highly skilled at using our skills to communicate with students, teachers, program administrators, state and national policy makers, and the adult education research community.
- *Literacy specialists* – A former ABE program director, Sally Waldron has taught all levels of ABE, reading, writing and math, and she helped to found the highly

successful Massachusetts' System for Adult Basic Education Support (SABES). John Strucker is a nationally-recognized expert in adult literacy research, teaching, reading, and professional development. He is an experienced adult reading teacher who directed the Harvard Adult Literacy Lab, and taught diagnostic assessment and teaching at the Harvard Graduate School of Education from 1996-2007. Carey Reid has taught reading and writing in community-based adult literacy programs and now manages online instruction and certification for SABES, and Steve Quann is an experienced ELL teacher. Andy Nash also has substantial experience in ELL and civic literacy instruction and curriculum development. Kaye Beall has experience as a basic reading instructor and tutor trainer. Cynthia Zafft is a learning disabilities specialist.

- *Content specialists* – In addition to the above-mentioned content expertise in adult reading instruction, WEI has pioneered the improvement of math teaching through participation in the Adult Numeracy Network <http://www.adulturnumeracynetwork.org/resources.html> and the design of professional development (both online and face-to-face) in math instruction.
- *Experience in project/program development, data analysis, and data collection and reporting* – Under Sally Waldron's direction, the WEI U.S. Division has developed and currently manages projects with combined budgets totaling \$2.5 million, including research projects, evaluation contracts, the creation and management of professional associations such as NELRC and NCTN, and an array of face-to-face and online professional development projects. Most of these projects require extensive reporting of data to public and private funders (e.g., research reports supported by data or documenting teacher satisfaction and impact on classroom practice through participation in SABES staff development activities), as well as the internal collection and analysis of data pertaining to website use, online course participation, and conference registrations.

### Examples of Similar Projects

Examples of possible similar projects are included above in Relevant Experience and Expertise.

### Experience Using Technology in Education

Several examples of WEI's use of technology in education are included above. Through the New England Literacy Resource Center, WEI designed and operates the New England Adult Education Professional Development Network the goal of which is to build the capacity of adult basic education, adult secondary education/college transition and ELL providers to offer the highest possible quality instruction and related services that enable adult learners to meet their educational and life goals. The Network uses a professional development approach that blends face-to-face training with webinars and an ongoing learning community on a Ning platform. The FY2011 professional development offering focused on technology integration and Universal Design for

Learning in which 12 RI adult educators participated. The initial offering in FY2012 focuses on youth in adult basic education.

### References

Anne Serino, State ABE Director, Adult and Community Learning Services, Department of Elementary and Secondary Education, 75 Pleasant Street, Malden, MA 02148. (781) 338-3802. [aserino@doe.mass.edu](mailto:aserino@doe.mass.edu)

Jill Holloway, Director, RI Professional Development Center, 144 Bignall Street, Warwick, RI 02888. (401) 941-8353. [jholloway@riaepdc.org](mailto:jholloway@riaepdc.org)

Art Ellison, Administrator, Bureau of Adult Education, NH Department of Education, 21 South Fruit Street, Suite 21, Concord, NH 03301. (603) 271-6698. [aellison@ed.state.nh.us](mailto:aellison@ed.state.nh.us)

### Staff Responsibilities and Related Qualifications

**Sally Waldron**, Vice President of the U.S. Division, has worked in adult education since 1971. Her experience includes teaching reading, math, and GED preparation; directing a citywide adult education program; designing and providing professional development; conducting evaluations of statewide professional development systems; and extensive proposal writing and fundraising. Since coming to WEI, she has served as the director for the System for Adult Basic Education Support and numerous other state and national projects including the redesign of the ASRP website and a review of the Ohio State Adult Education Leadership system. Waldron currently oversees the work of the U.S. Division. She has an M.Ed. from Tufts University.

**Silja Kallenbach**, Director of the U.S. Division, has also served as the Director of the New England Literacy Resource Center at World Education since 1994. Kallenbach has helped design and oversees several multi-state professional development initiatives, most recently, the New England ABE-to-College Transition Project, the National College Transition Network, and the New England Learner Persistence project. She is co-author of *Transitioning Adults to College: Adult Basic Education Program Models* (National Center for the Study of Adult Learning and Literacy, 2006) and *Postsecondary Success of Young Adults: System Impact Opportunities In Adult Education* (NCTN/ World Education, 2010). Kallenbach has 28 years of experience in adult education as a teacher, administrator, researcher, professional development provider and program developer. She is former director of the City of Boston Adult Literacy Initiative, and a co-founder and former Associate Director of the Boston Adult Literacy Fund. Kallenbach holds a M.A. in Bilingual and ESOL Studies from the University of Massachusetts.

**Kaye Beall** co-directs U.S. ED's Region 1 Professional Development Center and coordinates the U.S. Division's online professional development initiative. Beall has worked in adult literacy since 1980, serving as an instructor, program director, consultant, program development director, training coordinator, and state outreach

coordinator. In her current position, as well as in her previous NCSALL role, she promotes research and training materials to states, develops training materials and online training, and works with professional developers to build the capacity of state professional development systems to promote research-based practice. Beall has a Masters of Library Science degree from Indiana University.

**Sandy Goodman** was the Director of the New England College Transition Project at WEI, and is the Director of the National Career Awareness project funded by the Office of Vocational and Adult Education, U.S. ED. Goodman was the lead trainer of the *Integrating Career Awareness into the ABE/ESOL Classroom* curriculum. Her work includes: developing and overseeing college transition and career pathways initiatives and providing technical assistance and professional development to individual programs, state adult education systems, and local, regional, and state partnerships. She edited the *Integrating Career Awareness* curriculum, wrote the online companion course, and directed the New England Career Awareness pilot, upon which the national project is based. She is also a lead author and editor of the *College Transition Toolkit*. She has an MPA from the Harvard University Kennedy School of Government.

**Andy Nash** has been a teacher and professional developer for 25 years. She specializes in ELL instruction, standards-based instruction, learner persistence, and the integration of adult literacy education with civic engagement. She has expertise in teaching; staff, program, and resource development; program planning and evaluation; and action research. Her professional development work in ELL ranges from workshops and site-based technical assistance for local programs to facilitation of state-sponsored initiatives, such as bringing together EL/civics and citizenship teachers to document and share best practices and facilitating ELL standards development initiatives (OR, WA, TX, RI, OK) to resource development and technical assistance on broad national projects (OVAE's Standards in Action, Equipped for the Future). Nash has developed curricula, an online toolkit for standards-based teaching, study circles on second language acquisition and on peer coaching and mentoring (as well as a guide on how to facilitate a study circle), film discussion guides, self-paced on-line courses, and web-based learning communities where teachers collaborated on their action research about learner persistence. She spent many years as an adult ESOL instructor and as a lecturer in the Graduate Bilingual/ESOL Studies Department of the University of Massachusetts at Boston, and has published in the CATESOL Journal and elsewhere.

As Instructional Technologist for World Education, **Steve Quann** designs, develops, evaluates, and advises on online learning projects. He has a Master's in Education and a graduate certificate in Instructional Design Technology. His extensive experience teaching adult English language learners informed his development of technology-enhanced curriculum. Quann is the co-author of three publications on the integration of technology in the ELL classroom and facilitates workshops on the topic at national conferences. His background as a teacher and curriculum developer now informs his instructional design work. Quann designed and maintains numerous websites for WEI, is proficient in the use Web 2.0 tools, and develops multimedia for online courses. With over nine years experience in instructional design and development, Quann has presented on web conferencing applications (Webex, DimDim,

and Wimba) and created content for use with numerous learning management systems (Web CT/Blackboard, Moodle, Intralearn and GeoLearning).

**Carey Reid** has been involved in education for over 25 years and currently works as the Curriculum and Assessment Coordinator for the System for Adult Basic Education Support. He has taught English as a Second Language; adult basic skills in reading, math, and writing; college courses in ESL, expository writing, creative writing, and film studies; and literature for Upward Bound programs for promising high school students. He currently specializes in staff and program development and facilitates face-to-face and online courses and workshops. He has developed websites and online tutorials to provide support for curriculum development, lesson planning, assessment, and student leadership development. He has an M.A. from Brown University.

**John Strucker** is a project manager and researcher in adult literacy and teacher education. He served as a Research Associate at the National Center for the Study of Adult Learning and Literacy (NCSALL) and Lecturer in Education at the Harvard Graduate School of Education, where he taught a laboratory practicum course, "Developing Reading in Adults and Older Adolescents." While at NCSALL he was the Principal Investigator on several large-scale research projects, including the Adult Reading Components Study, a cluster analysis of the reading strengths and needs of 955 adult literacy and ELL students, and the International Adult Literacy Study (IALS), a latent class analysis of the component skills of 1,084 IALS participants enrolled in U.S. adult literacy and ELL classes. He has served as a consultant for the U.S. ED Office of Vocational and Adult Education, the National Institute for Literacy, Statistics Canada, UNESCO, and the Commonwealth of Massachusetts. Prior to his work at Harvard, Dr. Strucker worked for 11 years as an adult literacy and ESL teacher in Cambridge, MA.

**Luanne Teller** has more than 25 years of experience working with adult learners. She is the current director of the System for Adult Basic Education Support, and created and served as the director of three adult education programs, including a job skills training and job placement program, an ESOL program, and a transitions to college program. Her work has also included curriculum development, teaching, advising, and developing partnerships with employers and community organizations. Teller's areas of training and technical assistance expertise include managed enrollment, data analysis, and continuous improvement planning.

**Cynthia Zafft** has an MS and RN, is the senior advisor for the National College Transition Network, and is the education director for the Health Care Learning Network at WEI. Her experience includes working in partnership with workforce development stakeholder groups to fund, manage, develop, and deliver contextualized, online, competency-based instruction for frontline healthcare workers; developing and delivering customized online and face-to-face professional development for adult educators and administrators; and technical assistance to community college faculty to better serve student with disabilities, focusing on Universal Design for Learning.

## Resumes

Staff resumes are included with the attachments.

BUDGET DETAIL SHEET  
FISCAL YEAR 2013

SALARY AND FRINGE BENEFIT DETAIL

NAME	POSTION TITLE	HOURLY RATE
Sally Waldron	Vice President	\$103.50
Silja Kallenbach	Director	\$88
Kaye Beall	Adult Education Specialist	\$62.10
Sandy Goodman	Adult Education Specialist	\$62.10
Andy Nash	Adult Education Specialist	\$62.10
Steve Quann	Instructional Technologist and Website Developer	\$62.10
Carey Reid	Adult Education Specialist	\$62.10
John Strucker	Adult Education Specialist	\$77.65
Luanne Teller	Adult Education Specialist	\$67
Cynthia Zafft	Adult Education Specialist	\$62.10
TOTAL REQUEST		

CONSULTANT DETAIL

NAME	POSITION TITLE	HOURLY RATE
Marina Blanter	Graphic Designer	\$103.50
Cassie Bryant	Evaluation Specialist	\$103.50
Barbara Goodridge	Numeracy Specialist	\$103.50
Barbara Hofmeyer	Transitions Specialist	\$103.50
Jean Stephens	Numeracy Specialist	\$103.50

EXPLANATION OF OTHER EXPENSES

EXPENSE CATEGORY	DESCRIPTION	COST
Travel	Roundtrip mileage from Massachusetts to Rhode Island	Est. \$.55/mile based on U.S. Government Mileage rate
Hotel and Per Diem	Overnight stays, meals, and incidentals in Rhode Island, if needed, for multiple-day trainings	U.S. Government Hotel and Per Diem rates
Education Supplies and Materials	Supplies and materials for trainings	\$100 - \$500/training depending on the number of participants
Indirect	Negotiated Indirect Cost Rate Agreement	38.85% on direct costs, excluding equipment

BUDGET DETAIL SHEET  
FISCAL YEAR 2014

SALARY AND FRINGE BENEFIT DETAIL

NAME	POSTION TITLE	HOURLY RATE
Sally Waldron	Vice President	\$107.15
Silja Kallenbach	Director	\$91.10
Kaye Beall	Adult Education Specialist	\$64.30
Sandy Goodman	Adult Education Specialist	\$64.30
Andy Nash	Adult Education Specialist	\$64.30
Steve Quann	Instructional Technologist and Website Developer	\$64.30
Carey Reid	Adult Education Specialist	\$64.30
John Strucker	Adult Education Specialist	\$80.40
Luanne Teller	Adult Education Specialist	\$69.35
Cynthia Zafft	Adult Education Specialist	\$64.30
TOTAL REQUEST		

CONSULTANT DETAIL

NAME	POSITION TITLE	HOURLY RATE
Marina Blanter	Graphic Designer	\$107.15
Cassie Bryant	Evaluation Specialist	\$107.15
Barbara Goodridge	Numeracy Specialist	\$107.15
Barbara Hofmeyer	Transitions Specialist	\$107.15
Jean Stephens	Numeracy Specialist	\$107.15

EXPLANATION OF OTHER EXPENSES

EXPENSE CATEGORY	DESCRIPTION	COST
Travel	Roundtrip mileage from Massachusetts to Rhode Island	Est. \$.55/mile based on U.S. Government Mileage rate
Hotel and Per Diem	Overnight stays, meals, and incidentals in Rhode Island, if needed, for multiple-day trainings	U.S. Government Hotel and Per Diem rates
Education Supplies and Materials	Supplies and materials for trainings	\$100 - \$500/training depending on the number of participants
Indirect	Negotiated Indirect Cost Rate Agreement	38.85% on direct costs, excluding equipment

BUDGET DETAIL SHEET  
FISCAL YEAR 2015

SALARY AND FRINGE BENEFIT DETAIL

NAME	POSTION TITLE	HOURLY RATE
Sally Waldron	Vice President	\$110.90
Silja Kallenbach	Director	\$94.30
Kaye Beall	Adult Education Specialist	\$66.55
Sandy Goodman	Adult Education Specialist	\$66.55
Andy Nash	Adult Education Specialist	\$66.55
Steve Quann	Instructional Technologist and Website Developer	\$66.55
Carey Reid	Adult Education Specialist	\$66.55
John Strucker	Adult Education Specialist	\$83.25
Luanne Teller	Adult Education Specialist	\$71.80
Cynthia Zafft	Adult Education Specialist	\$66.55
TOTAL REQUEST		

CONSULTANT DETAIL

NAME	POSITION TITLE	HOURLY RATE
Marina Blanter	Graphic Designer	\$110.90
Cassie Bryant	Evaluation Specialist	\$110.90
Barbara Goodridge	Numeracy Specialist	\$110.90
Barbara Hofmeyer	Transitions Specialist	\$110.90
Jean Stephens	Numeracy Specialist	\$110.90

EXPLANATION OF OTHER EXPENSES

EXPENSE CATEGORY	DESCRIPTION	COST
Travel	Roundtrip mileage from Massachusetts to Rhode Island	Est. \$.55/mile based on U.S. Government Mileage rate
Hotel and Per Diem	Overnight stays, meals, and incidentals in Rhode Island, if needed, for multiple-day trainings	U.S. Government Hotel and Per Diem rates
Education Supplies and Materials	Supplies and materials for trainings	\$100 - \$500/training depending on the number of participants
Indirect	Negotiated Indirect Cost Rate Agreement	38.85% on direct costs, excluding equipment

BUDGET DETAIL SHEET  
FISCAL YEAR 2016 (Optional Extension Year)

SALARY AND FRINGE BENEFIT DETAIL

NAME	POSTION TITLE	HOURLY RATE
Sally Waldron	Vice President	\$114.80
Silja Kallenbach	Director	\$97.60
Kaye Beall	Adult Education Specialist	\$68.90
Sandy Goodman	Adult Education Specialist	\$68.90
Andy Nash	Adult Education Specialist	\$68.90
Steve Quann	Instructional Technologist and Website Developer	\$68.90
Carey Reid	Adult Education Specialist	\$68.90
John Strucker	Adult Education Specialist	\$86.20
Luanne Teller	Adult Education Specialist	\$74.30
Cynthia Zafft	Adult Education Specialist	\$68.90
TOTAL REQUEST		

CONSULTANT DETAIL

NAME	POSITION TITLE	HOURLY RATE
Marina Blanter	Graphic Designer	\$114.80
Cassie Bryant	Evaluation Specialist	\$114.80
Barbara Goodridge	Numeracy Specialist	\$114.80
Barbara Hofmeyer	Transitions Specialist	\$114.80
Jean Stephens	Numeracy Specialist	\$114.80

EXPLANATION OF OTHER EXPENSES

EXPENSE CATEGORY	DESCRIPTION	COST
Travel	Roundtrip mileage from Massachusetts to Rhode Island	Est. \$.55/mile based on U.S. Government Mileage rate
Hotel and Per Diem	Overnight stays, meals, and incidentals in Rhode Island, if needed, for multiple-day trainings	U.S. Government Hotel and Per Diem rates
Education Supplies and Materials	Supplies and materials for trainings	\$100 - \$500/training depending on the number of participants
Indirect	Negotiated Indirect Cost Rate Agreement	38.85% on direct costs, excluding equipment

**PAAWD**

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.

**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.

**CAMPAIGN INCLUDING ARRA SUPPLEMENTAL TERMS & CONDITIONS**

EVERY PERSON OR BUSINESS ENTITY PROVIDING GOODS OR SERVICES AT A COST OF \$5000 CUMULATED VALUE IS REQUIRED TO FILE AN AFFIDAVIT REGARDING POLITICAL CAMPAIGN CONTRIBUTIONS WITH THE RI STATE BOARD OF ELECTIONS EVEN IF NO REPORTABLE CAMPAIGN CONTRIBUTIONS HAVE BEEN MADE. (RI GENERAL LAW 17-27) FORMS OBTAINED AT BOARD OF ELECTIONS, CAMPAIGN FINANCE DIVISION, 50 BRANCH AVENUE PROVIDENCE 02904 (401-222-2056).

**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)."

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## TERMS

**SCOPE AND LIMITATIONS** - This Agreement covers requirements as described herein, ordered by State agencies during the Agreement Period. No additional or alternative requirements are covered, unless added to the Agreement by formal amendment by the State Purchasing Agent or his designee.

Under State Purchasing Law, 37-2-54, no purchase or contract shall be binding on the state or any agency thereof unless approved by the department [of administration] or made under general regulations which the chief purchasing officer may prescribe. Under State Purchasing Regulation 8.2.1.1.2, any alleged oral agreement or arrangements made by a bidder or contractor with any agency or an employee of the Office of Purchases may be disregarded and shall not be binding on the state.

**PRODUCT ACCEPTANCE** - All merchandise offered or otherwise provided shall be new, of prime manufacture, and of first quality unless otherwise specified by the State. The State reserves the right to reject all nonconforming goods, and to cause their return for credit or replacement, at the State's option.

- a) Failure by the state to discover latent defect(s) or concealed damage or non-conformance shall not foreclose the State's right to subsequently reject the goods in question.
- b) Formal or informal acceptance by the State of non-conforming goods shall not constitute a precedent for successive receipts or procurements.

Where the vendor fails to cure the defect promptly or replace the goods, the State reserves the right to cancel the Release, contract with a different vendor, and to invoice the original vendor for any differential in price over the original contract price.

## ORDER AUTHORIZATION AND RELEASE AGAINST PRICING AGREEMENT

**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.**

**State Agencies shall request release as follows: All releases shall reference the Price Agreement number, the Contract Issue number, the item(s) covered, and the unit pricing in the same format as described herein.**

A Department Purchase Order (DPO) listing the items ordered shall be created by the

agency. The agency may mail or fax a copy of the order to the Vendor. In some cases the agency may request delivery by telephone, but must provide the Vendor with a DPO Order Number reference for billing purposes. Vendors are encouraged to require written orders to assure payments are processed accurately and promptly.

**DELIVERY** If this is an MPA, Vendor will obtain "ship to" information from each participating agency. This information will be contained in the DPO. APA delivery information will be contained in the Notice of Award.

**PRICING** - All pricing shall be as described herein, 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 herein.

**INVOICING** All invoices shall reference the DPO Order Number(s), Price Agreement number, the Contract Issue number, the item(s) covered, and the unit pricing in the same format as described herein. If this is an MPA, Vendor will obtain "bill to" information from each participating agency. This information will be contained in the DPO. APA billing information will be contained in the Notice of Award.

**PAYMENT** - Invoices for items not received, not priced according to contract or for work not yet performed will not be honored. No payment will be processed to any vendor for whom there is no IRS W-9 on file with the State Controller. \

**P1**

DELIVERY OF GOODS OR SERVICES AS REQUESTED BY AGENCY.  
PAYMENTS WILL BE AUTHORIZED UPON SUBMISSION OF PROPERLY  
RENDERED INVOICES TO THE RECEIVING AGENCY. ANY UNUSED  
BALANCE AT END OF BLANKET PERIOD IS AUTOMATICALLY CANCELLED.

P6

THIS PURCHASE ORDER IS AWARDED SUBJECT TO EQUAL OPPORTUNITY  
COMPLIANCE.

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.

## INSURANCE2

ANNUAL RENEWAL INSURANCE CERTIFICATES FOR WORKERS' COMPENSATION, PUBLIC LIABILITY, PROPERTY DAMAGE INSURANCE, AUTO INSURANCE, PROFESSIONAL LIABILITY INSURANCE (AKA ERRORS & OMISSIONS), BUILDER'S RISK INSURANCE, SCHOOL BUSING AUTO LIABILITY, ENVIRONMENTAL IMPAIRMENT (AKA POLLUTION CONTROL), VESSEL OPERATION (MARINE OR AIRCRAFT) PROTECTION & INDEMNITY, ETC., MUST BE SUBMITTED TO THE SPECIFIC AGENCY IDENTIFIED IN THE "BILL TO" SECTION OF THE PURCHASE ORDER. CERTIFICATES ARE ANNUALLY DUE PRIOR TO THE BEGINNING OF ANY CONTRACT PERIOD BEYOND THE INITIAL TWELVE-MONTH PERIOD OF A CONTRACT. FAILURE TO PROVIDE ANNUAL INSURANCE CERTIFICATION MAY BE GROUNDS FOR CANCELLATION.



COMPENSATION TYPE - REIMBURSEMENT. RATE OF REIMBURSEMENT SET AT \$1 FOR EACH \$1 OF ALLOWABLE EXPENSES.



REPORTS - The Vendor agrees to provide the State with quarterly reports describing activity against this Price Agreement. If this is a Master Price Agreement, such reports shall include usage by municipalities, quasi-public agencies, schools, etc. All reports shall contain the following data: (1) Billing volume in dollars and (2) quantity shipped for each line item in the price agreement. When there are no line items in the price agreement, vendor shall report volume by catalog order numbers, with a brief description of each order number. Reports must be submitted to the RI Division of Purchases to the attention BUYER named in this notice, identifying the Agreement number and the Reporting Period. Quarterly reports shall be due 45 calendar days after the end of each quarter. Failure to submit required reports shall be considered a breach of the contractor's obligations and may be considered, at the discretion of the State Purchasing Agent, sufficient cause for the termination of the agreement and other outstanding agreements and orders, and possible suspension from participation in additional State procurements.

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).