

NOTICE OF SOLE SOURCE PROCUREMENT

Date: January 23, 2018

Vendor/Contractor: WISE

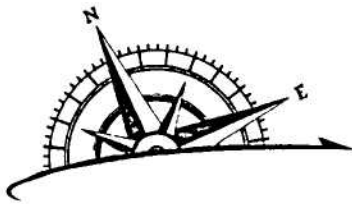
Contract Amount: \$55,800

Description of Services: Pre-test and exam vouchers for required Personal Finance Course.

Sole Source Determination: Only authorized distributor in the Commonwealth of Virginia for the WISE Financial Literacy Certification Program.

Date of Award: TBD

JAN 23 2018 AM10:31



VIRGINIA BEACH CITY PUBLIC SCHOOLS
CHARTING THE COURSE

Department of Teaching and Learning

MEMORANDUM

TO: J. Kevin Beardsley, Director, Purchasing Services

FROM: Amy E. Cashwell, Ed.D., Chief Academic Officer
James M. Pohl, Ph.D., Executive Director of Secondary Teaching and Learning
Sara L. Lockett, Ed.D., Director of Technical and Career Education

**SUBJECT: SOLE SOURCE JUSTIFICATION FOR W!SE FINANCIAL LITERACY
CERTIFICATION EXAM VOUCHERS**

DATE: Jan. 2, 2018

REQUISITION #: TCED-18-0305025

TOTAL DOLLAR AMOUNT: \$55,800.00

JUSTIFICATION FOR SOLE SOURCE:

In continued support of career and technical programs throughout Virginia Beach City Public Schools, the Office of Technical and Career Education in support of business and information technology education, proposes the purchase of 4,650 pre-test vouchers and 4,650 exam vouchers for the required Personal Finance course. This partnership will permit students to attempt the W!SE Financial Literacy industry credential. Students successfully earning this certification while passing the corresponding Personal Finance course satisfy the standard diploma requirement of obtaining a Technical and Career Education (TCE) credential in a TCE course.

/kb

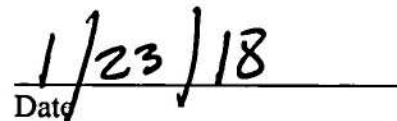
Attachments

cc: Aaron C. Spence, Ed.D., Superintendent

Approved:



J. Kevin Beardsley, Director
Office of Purchasing Services



Date

T&L/TCE-0141



working in support of education

Phyllis Frankfort Perillo
President

January 2018

Theresa Dougherty
Technical and Career Education
Virginia Beach City Public Schools
1800 College Crescent
Virginia Beach, VA 23453

Re: The WISE Financial Literacy Certification Program and Test

Dear Ms. Dougherty:

This letter shall serve to advise you that Working in Support of Education, Inc. located at 227 East 56th Street, Suite 201, New York, NY 10022 is the sole authorized educational distributor of the WISE Financial Literacy Certification Program and Test in the state of Virginia.

Purchase Orders should be sent directly to Working in Support of Education for processing and may either be mailed to the address below or faxed to the number below.

If you should have any questions or concerns, please do not hesitate to contact me.

Sincerely,



David Anderson
Executive Vice President



Working in Support of Education
227 East 56th Street
Suite 201
New York, NY 10022 US
212-421-2700
lhenrich@wise-ny.org

BILL TO

2017-2018 FLCP Testing
Anjanette Hendricks
Virginia Beach City Public
Schools
2512 George Mason Drive
P.O. Box 6038
Virginia
Virginia Beach, VA 23456-0038

INVOICE F14- 1726

DATE 11/06/2017 TERMS Net 30

DUE DATE 12/06/2017

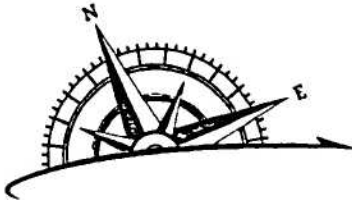
P.O. NUMBER

TESTING THRU OCTOBER 31

ACTIVITY	QTY	RATE	AMOUNT
FLCP Fall Pre-test Financial Literacy Pre-test-Fall -Ocean Lakes High School	201	4.00	804.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Princess Anne High School	168	4.00	672.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Bayside High School	193	4.00	772.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-First Colonial High School	217	4.00	868.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Floyd Kellam High School	280	4.00	1,120.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Frank W. Cox High School	208	4.00	832.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Green Run Collegiate	49	4.00	196.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall - Green Run High School	162	4.00	648.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Kempsville High School	232	4.00	928.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Landstown High School	82	4.00	328.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Renaissance Academy	32	4.00	128.00

ACTIVITY	QTY	RATE	AMOUNT
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Salem High School	235	4.00	940.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Tallwood High School	217	4.00	868.00
FLCP Fall Pre-test Financial Literacy Pre-test-Fall-Virginia Beach Juvenile Detention Center	7	4.00	28.00
Volume Discount Volume Discount - \$.50 per test	2,283	-0.50	-1,141.50
FLCP Fall Certification Test Financial Literacy Certification Test-Fall- Renaissance Academy	10	8.00	80.00

TOTAL DUE \$8,070.50



VIRGINIA BEACH CITY PUBLIC SCHOOLS
CHARTING THE COURSE

Department of Teaching and Learning

CONTRACT FOR SERVICES
BETWEEN THE SCHOOL BOARD OF THE CITY OF VIRGINIA BEACH AND
WISE-WORKING IN SUPPORT OF EDUCATION, INC.
227 East 56th Street, Suite 201
New York, NY 10022

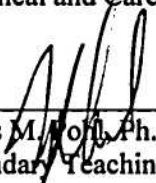
Approved as to Content:



Sara L. Lockett, Ed.D., Director of
Technical and Career Education

1/3/18


Date



James M. Poff, Ph.D., Executive Director of
Secondary Teaching and Learning

1/5

Date



Amy E. Cashwell, Ed.D., Chief Academic Officer
Department of Teaching and Learning

1/2/18

Date

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Approved as to Availability of Funds and Business Content:

Crystal M. Pate, Director
Business Services
Federal Tax ID Number: 54-0722075

Date

GENERAL CONTRACT EXECUTION POLICY 3-89
FISCAL NOTE

Technical & Career Education/Dept. of Teaching & Learning
SCHOOL/DEPARTMENT

116.50300.603407.0107700
ACCOUNT NUMBER

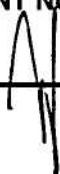
SOLE SOURCE: WISE FINANCIAL LITERACY CERTIFICATION PROGRAM PRE-TESTS AND TESTS
CONTRACT INFORMATION

YEAR	FISCAL YEAR	(a) ESTIMATED COSTS	(b) ESTIMATED REVENUES	NET DIFFERENCE (a) - (b)
1	2017-2018	\$ 55,800.00		\$ 55,800.00
2				\$ -
3				\$ -
4				\$ -
5				\$ -
TOTAL		<u>\$ 55,800.00</u>	<u>\$ -</u>	<u>\$ 55,800.00</u>

SCHOOL CONTRACTS ONLY

SCHOOL BOOKEEPER VERIFICATION THAT FUNDS ARE AVAILABLE OR WILL BE AVAILABLE IN THE ABOVE ACCOUNT NUMBER

Sara Lockett
SCHOOL BOOKEEPER'S SIGNATURE



1/3/18
DATE

CAPITAL PROJECTS ONLY

TOTAL COST TO COMPLETE THE PROJECT: **RECEIVED** \$ _____
 PROJECT BUDGET: **Virginia Beach City** \$ _____
 CONTRACT BASE COST: **JAN 19 2018** \$ _____
School Board
Business Services \$ _____

SCHOOL/DEPT. AUTHORIZED SIGNATURE

DATE

Note: See Section 19 (Contracts) in the Business Manual for Schools and Central Offices for further information on contract processing.

**DEPARTMENT OF TEACHING AND LEARNING
DOCUMENT PROOFING SLIP
(Memos, Contracts, School Board Agenda Sheets, Reports, Etc.)**

DOCUMENT: SOLE SOURCE MEMO: WORKING IN SUPPORT OF EDUCATION WISE Financial Literacy Certification Program and Tests

Originator: Theresa Dougherty Typist: Karen Boone Date: 1/2/18

Proofed by:

Funded by: Local Grant

1) Director's Office Associate

K. Boone Date: 1/2/17

2) TCE Director

Sara L. Holt Date: 1/3/18

3) Executive Director's Office Associate

_____ Date: _____

4) Executive Director

[Signature] Date: _____

5) Chief Academic Officer's Office Associate

_____ Date: _____

6) Administrative Coordinator (if applicable)

_____ Date: _____

7) Chief Academic Officer

_____ Date: _____