



Date: January 10, 2023  
To: Board of Supervisors  
From: Sanja Bugay, Director, Department of Social Services  
Subject: Advance Agenda Item Materials – January 24, 2023

On January 24, 2023, the Department will bring for your Board's consideration an Agenda Item to approve a contract with Brain Learning Psychological Corporation (Brain Learning) for the provision of CalWORKs Welfare to Work Specialized Assessments. The item also includes a recommended action to consider an appeal from the incumbent vendor, Foster Assessment Center and Testing Service, Inc. (FACTS). The review committee for this RFP recommended FACTS as the successful bidder, but due to a significant cost difference between the two proposals with no substantial difference in the quality of service, the Department overruled the recommendation of the review committee and is instead recommending Brain Learning as the successful bidder.

On 11/30/2022, a tentative award and recommendation letter was posted on Public Purchasing awarding the bid to Brain Learning; a letter of appeal was subsequently received from FACTS on 12/5/22. The Purchasing Manager responded to FACTS on 12/21/22 denying the appeal. On 1/5/23, FACTS again appealed the decision to the CAO and on 1/10/23, the CAO responded, denying the appeal. The agency has until January 17<sup>th</sup> to inform the County Purchasing Manager that they intend to appeal the decision to the Board of Supervisors. Neither the Purchasing Manager nor the CAO found merit in the FACTS appeal.

Due to the potential for an appeal at the Board level, the Department is providing the following advance agenda materials for the January 24<sup>th</sup> item:

- Timeline related to the Request for Proposal RFP 23-006: Welfare-To-Work Specialized Assessments;
- The RFP, Addendum, and vendor RFP responses;
- RFP Evaluation Tools, including blank and completed tools;
- RFP Summary of Evaluation and Award Notice;
- FACTS appeal letters to the Purchasing Manager and their response; and
- FACTS appeal letters to the County Administrative Officer and their response.

Should you have any questions, please contact me at 600-2300.

Timeline for RFP 23-006 Welfare-to-Work Specialized Assessments

8/26/22: RFP Released on Public Purchase.

9/7/22: Bidders' Conference held virtually via Microsoft Teams.

9/13/22: Addendum Number One released on Public Purchase.

9/23/22: RFP closed on Public Purchase at 10:00am. Two electronic responses received:

1. Foster Assessment Center and Testing Service, Inc. (FACTS)
2. Brain Learning Psychological Corporation

9/26/22: Initial Review Committee Meeting held online via Microsoft Teams. Proposals were distributed to reviewers.

10/10/22: First Review Committee Meeting and ranking held online via Microsoft Teams.

10/25/22: Second Review Committee Meeting and ranking held online via Microsoft Teams.

11/29/22: Recommendation letter received from Department of Social Services.

11/30/22: Tentative Award and Recommendation Letter posted on Public Purchase.

12/5/22: Purchasing Manager received an appeal letter from FACTS.

12/21/22: Purchasing Manager emailed and mailed response to FACTS denying their appeal.

1/6/23: CAO received an appeal letter from FACTS.

1/10/23: CAO emailed and mailed response to FACTS denying their appeal.

# COUNTY OF FRESNO



## REQUEST FOR PROPOSAL

**NUMBER: 23-006**

## WELFARE-TO-WORK SPECIALIZED ASSESSMENTS

---

**Issue Date: August 26, 2022**

**Closing Date: SEPTEMBER 23, 2022 AT 10:00 A.M.**

All Questions and Responses must be electronically submitted on the Bid Page on Public Purchase.

For assistance, contact **Margo Jacobie** at Phone (559) 600-7110.

---

### BIDDER TO COMPLETE

Undersigned agrees to furnish the commodity or service stipulated in the attached at the prices and terms stated in this RFP.  
Bid must be signed and dated by an authorized officer or employee.

---

COMPANY

---

CONTACT PERSON

---

ADDRESS

---

CITY

STATE

ZIP CODE

---

( )

TELEPHONE NUMBER

E-MAIL ADDRESS

---

AUTHORIZED SIGNATURE

---

PRINT NAME

TITLE

## TABLE OF CONTENTS

	<u>PAGE</u>
OVERVIEW .....	3
KEY DATES .....	4
GENERAL REQUIREMENTS & CONDITIONS.....	5
INSURANCE REQUIREMENTS .....	9
BID INSTRUCTIONS .....	10
SCOPE OF WORK.....	12
SCOPE OF WORK PROPOSAL REQUIREMENTS .....	16
AWARD CRITERIA .....	18
PROPOSAL CONTENT REQUIREMENTS.....	19
TRADE SECRET ACKNOWLEDGEMENT .....	22
DISCLOSURE – CRIMINAL HISTORY & CIVIL ACTIONS.....	23
CERTIFICATION.....	25
REFERENCE LIST.....	26
PARTICIPATION.....	27
CHECK LIST .....	28
EXHIBITS.....	29

## **OVERVIEW**

The County of Fresno, on behalf of the Department of Social Services (DSS), is requesting proposals from qualified bidders to provide specialized assessments for Limited English Proficiency (LEP), Learning Disability Evaluations (LDE), and Independent Assessments (third party review). Assessment services are intended for recipients of California Work Opportunity and Responsibility to Kids (CalWORKs) Welfare-To-Work (WTW) benefits in Fresno County, ages 18-59, and will be paid on a fee-for-service basis through the CalWORKs Single Allocation. The purpose is to assess WTW participants for language barriers, learning or intellectual disabilities, and other physical, mental, and/or psychological barriers that may prevent an individual from engaging in employment or educational training, with the goal of recommending appropriate accommodations.

It is the intent of this Request for Proposal (RFP) to enter into an agreement, as applicable, with one or more selected bidders.

## KEY DATES

**RFP Issue Date:** August 26, 2022

**Bidders' Conference:** September 7, 2022 at 11:00 A.M.  
VIA MICROSOFT TEAMS

**Bidders' Conference will be held online via Microsoft Teams. Bidders must email [mjacobie@fresnocountyca.gov](mailto:mjacobie@fresnocountyca.gov) by September 6, 2022 at 2:00 P.M. to receive link and instructions.**

**Written Questions for RFP Due:** September 9, 2022 at 10:00 A.M.  
Questions must be submitted on the Bid Page.

**RFP Closing Date:** September 23, 2022 at 10:00 A.M.  
Proposals must be electronically submitted on the Bid Page.

### **BIDDERS' CONFERENCE:**

A bidders' conference will be held in which the scope of the project and proposal requirements will be explained. Addenda will be prepared and distributed to all bidders if questions are submitted.

Bidders must RSVP by contacting **Margo Jacobie** by email at [mjacobie@fresnocountyca.gov](mailto:mjacobie@fresnocountyca.gov). Bidders' Conference will be cancelled if there are no RSVP's.

## GENERAL REQUIREMENTS & CONDITIONS

**TERM:** It is County's intent to contract with the successful bidder for a term of one year and six months, with an option to renew for a maximum of three additional one year periods based on mutual written consent.

The County reserves the right to terminate any resulting contract upon written notice.

**AWARD:** The award will be made to the vendor offering the proposal that is deemed the most advantageous to the County. Past performance (County contracts within the past seven years) and references may factor into awarding of a contract. The County will be the sole judge in making such determination. The County reserves the right to reject any and all proposals. Award Notices are tentative. Acceptance of an offer made in response to this RFP shall occur only upon execution of an agreement by both parties or issuance of a valid Purchase Order by Purchasing. After award, all bids shall be open to public inspection. The County assumes no responsibility for the confidentiality of information offered in a bid.

Award may require approval by the County of Fresno – Board of Supervisors.

**PARTICIPATION:** The bidder may agree to extend the terms of the resulting contract to other political subdivisions, municipalities, and tax-supported agencies. Such participating governmental bodies may make purchases in their own name, make payment directly to the bidder, and be liable directly to the bidder, holding the County of Fresno harmless.

**CONFIDENTIALITY:** Services performed by the bidder shall be in strict conformance with all applicable Federal, State of California and/or local laws and regulations relating to confidentiality, including but not limited to, California Civil Code, California Welfare and Institutions Code, Health and Safety Code, California Code of Regulations, Code of Federal Regulations.

The bidder shall submit to County's monitoring of said compliance.

The bidder may be a Business associate of County, as that term is defined in the "Privacy Rule" enacted by the Health Insurance Portability and Accountability Act of 1996 (HIPAA). As a HIPAA Business Associate, vendor may use or disclose protected health information ("PHI") to perform functions, activities or services for or on behalf of County, as specified by the County, provided that such use or disclosure shall not violate HIPAA and its implementing regulations. The uses and disclosures of PHI may not be more expansive than those applicable to County, as the "Covered Entity" under HIPAA's Privacy Rule, except as authorized for management, administrative or legal responsibilities of the Business Associate.

The bidder shall not use or further disclose PHI other than as permitted or required by the County, or as required by law without written notice to the County. The bidder shall ensure that any agent, including any subcontractor, to which vendor provides PHI received from, or created or received by the vendor on behalf of County, shall comply with the same restrictions and conditions with respect to such information.

**SUBCONTRACTORS:** If a subcontractor is proposed, complete identification of the subcontractor and his tasks should be provided. The primary contractor is not relieved of any responsibility by virtue of using a subcontractor. A specialty contractor cannot contract for work outside of their classification even if they are going to subcontract that work to another licensee who does hold the classification. The only classification that may do that is the B – General Building contractor.

**SELF-DEALING TRANSACTION DISCLOSURE:** Contractor agrees that when operating as a corporation (a for-profit or non-profit corporation), or if during the term of the agreement the Contractor changes its status to operate as a corporation, members of the Contractor's Board of Directors shall disclose any self-dealing transactions that they are a party to while Contractor is providing goods or performing services under the agreement with the County. A self-dealing transaction shall mean a transaction to which the Contractor is a party and in which one or more of its directors has a material financial interest. Members of the Board of Directors shall disclose any self-dealing transactions that they are a party to by completing and signing a Fresno County Self-Dealing Transaction Disclosure Form and submitting it to the County prior to commencing with the self-dealing transaction or immediately thereafter.

**LOCAL VENDOR PREFERENCE:** The Local Vendor Preference **does not** apply to this Request for Proposal.

**CONFLICT OF INTEREST:** The County shall not contract with, and shall reject any bid or proposal submitted by the persons or entities specified below, unless the Board of Supervisors finds that special circumstances exist which justify the approval of such contract:

- a. Employees of the County or public agencies for which the Board of Supervisors is the governing body.
- b. Profit-making firms or businesses in which employees described in Subsection (1) serve as officers, principals, partners or major shareholders.
- c. Persons who, within the immediately preceding twelve (12) months, came within the provisions of Subsection (1), and who were employees in positions of substantial responsibility in the area of service to be performed by the contract, or participated in any way in developing the contract or its service specifications.
- d. Profit-making firms or businesses in which the former employees described in Subsection (3) serve as officers, principals, partners or major shareholders.
- e. No County employee, whose position in the County enables him to influence the selection of a contractor for this RFP, or any competing RFP, and no spouse or economic dependent of such employee, shall be employees in any capacity by a bidder, or have any other direct or indirect financial interest in the selection of a contractor.
- f. In addition, no County employee will be employed by the selected vendor to fulfill the vendor's contractual obligations to the County.

**DISCLOSURE:** The bidder is required to disclose if, within the three-year period preceding the proposal, their owners, officers, corporate managers and partners have been convicted of, or had a civil judgment rendered against them for:

- i. fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction;
- ii. violation of a federal or state antitrust statute;
- iii. embezzlement, theft, forgery, bribery, falsification, or destruction of records; or
- iv. false statements or receipt of stolen property

Within a three-year period preceding their proposal, they have had a public transaction (federal, state, or local) terminated for cause or default.

**ORDINANCE 3.08.130 – POST-SEPARATION EMPLOYMENT PROHIBITED:** No officer or employee of the County who separates from County service shall for a period of one year after separation enter into any employment, contract, or other compensation arrangement with any County consultant, vendor, or other County provider of goods, materials, or services, where the officer or employee participated in any part of the decision making process that led to the County relationship with the consultant, vendor or other County provider of goods, materials or services.

Pursuant to Government Code section 25132(a), a violation of the ordinance may be enjoined by an injunction in a civil lawsuit, or prosecuted as a criminal misdemeanor.

**TIE BIDS:** In the event of a tie score between two or more proposals at the completion of the evaluation process, the evaluation team will break the tie by re-evaluating the proposals and coming to a consensus on which proposal to award. Additional information or interviews may be requested from bidders with the tied proposals.

**DATA SECURITY:** Individuals and/or agencies that enter into a contractual relationship with the County for the purpose of providing services must employ adequate controls and data security measures, both internally and externally to ensure and protect the confidential information and/or data provided to contractor by the County, preventing the potential loss, misappropriation or inadvertent access, viewing, use or disclosure of County data including sensitive or personal client information; abuse of County resources; and/or disruption to County operations.

Individuals and/or agencies may not connect to or use County networks/systems via personally owned mobile, wireless or handheld devices unless authorized by County for telecommuting purposes and provide a secure connection; up to date virus protection and mobile devices must have the remote wipe feature enabled. Computers or computer peripherals including mobile storage devices may not be used (County or Contractor device) or brought in for use into the County's system(s) without prior authorization from County's Chief Information Officer and/or designee(s).

No storage of County's private, confidential or sensitive data on any hard-disk drive, portable storage device or remote storage installation unless encrypted according to advance encryption standards (AES of 128 bit or higher).

The County will immediately be notified of any violations, breaches or potential breaches of security related to County's confidential information, data and/or data processing equipment which stores or processes County data, internally or externally.

County shall provide oversight to Contractor's response to all incidents arising from a possible breach of security related to County's confidential client information. Contractor will be responsible to issue any notification to affected individuals as required by law or as deemed necessary by County in its sole discretion. Contractor will be responsible for all costs incurred as a result of providing the required notification.

**AUDITS & RETENTION:** The Contractor shall maintain in good and legible condition all books, documents, papers, data files and other records related to its performance under this contract. Such records shall be complete and available to Fresno County, the State of California, the federal government or their duly authorized representatives for the purpose of audit, examination, or copying during the term of the contract and for a period of at least three (3) years following the County's final payment under the contract or until conclusion of any pending matter (e.g., litigation or audit), whichever is later. Such records must be retained in the manner described above until all pending matters are closed.

**PAYMENT:** County will make partial payments for all purchases made under the contract and accumulated during the month. Terms of payment will be net forty-five (45) days.

**DISPUTE RESOLUTION:** The ensuing contract shall be governed by the laws of the State of California.

Any claim which cannot be amicably settled without court action will be litigated in the U. S. District Court for the Eastern District of California in Fresno, CA or in a state court for Fresno County.

**ASSIGNMENTS:** The ensuing proposed contract will provide that the vendor may not assign any payment or portions of payments without prior written consent of the County of Fresno.

**ASSURANCES:** Any contract awarded under this RFP must be carried out in full compliance with The Civil Rights Act of 1964, The Americans With Disabilities Act of 1990, their subsequent amendments, and any and all other laws protecting the rights of individuals and agencies. The County of Fresno has a zero tolerance for discrimination, implied or expressed, and wants to ensure that policy continues under this RFP. The contractor must also guarantee that services, or workmanship, provided will be performed in compliance with all applicable local, state, or federal laws and regulations pertinent to the types of services, or project, of the nature required under this RFP. In addition, the contractor may be required to provide evidence substantiating that their employees have the necessary skills and training to perform the required services or work.

**LICENSES AND CERTIFICATIONS:** Any license(s) and/or certification(s) required in this RFP must be obtained by the bidder prior to submitting a proposal and must be active and in good standing. Proposals submitted without the proper license(s) and/or certification(s) will be deemed non-responsive.

**PUBLIC CONTRACT CODE SECTION 7028.15:** Where the State of California requires a Contractor's license; it is a misdemeanor for any person to submit a bid unless specifically exempted.

## INSURANCE REQUIREMENTS

Without limiting the County's right to obtain indemnification from contractor or any third parties, contractor, at its sole expense, shall maintain in full force and effect, the following insurance policies or a program of self-insurance, including but not limited to, an insurance pooling arrangement or Joint Powers Agreement (JPA) throughout the term of the Agreement:

1. Commercial General Liability: Commercial General Liability Insurance with limits of not less than Two Million Dollars (\$2,000,000.00) per occurrence and an annual aggregate of Four Million Dollars (\$4,000,000.00). This policy shall be issued on a per occurrence basis. County may require specific coverage including completed operations, product liability, contractual liability, Explosion-Collapse-Underground, fire legal liability or any other liability insurance deemed necessary because of the nature of the contract.
2. Automobile Liability: Comprehensive Automobile Liability Insurance with limits of not less than One Million Dollars (\$1,000,000.00) per accident for bodily injury and for property damages. Coverage should include any auto used in connection with this Agreement.
3. Professional Liability: If Contractor employs licensed professional staff, (e.g., Ph.D., R.N., L.C.S.W., M.F.C.C.) in providing services, Professional Liability Insurance with limits of not less than One Million Dollars (\$1,000,000.00) per occurrence, Three Million Dollars (\$3,000,000.00) annual aggregate.
4. Worker's Compensation: A policy of Worker's Compensation insurance as may be required by the California Labor Code.

### Additional Requirements Relating to Insurance:

Contractor shall obtain endorsements to the Commercial General Liability insurance naming the County of Fresno, its officers, agents, and employees, individually and collectively, as additional insured, but only insofar as the operations under this Agreement are concerned. Such coverage for additional insured shall apply as primary insurance and any other insurance, or self-insurance, maintained by County, its officers, agents and employees shall be excess only and not contributing with insurance provided under Contractor's policies herein. This insurance shall not be cancelled or changed without a minimum of thirty (30) days advance written notice given to County.

Contractor hereby waives its right to recover from County, its officers, agents, and employees any amounts paid by the policy of worker's compensation insurance required by this Agreement. Contractor is solely responsible to obtain any endorsement to such policy that may be necessary to accomplish such waiver of subrogation, but Contractor's waiver of subrogation under this paragraph is effective whether or not Contractor obtains such an endorsement.

Within thirty (30) days from the date Contractor executes this Agreement, Contractor shall provide certificates of insurance and endorsement as stated above for all of the foregoing policies, as required herein, to the **County of Fresno, Leah Melidonian, Sr. Staff Analyst**, [DSSContractInsurance@fresnocountyca.gov](mailto:DSSContractInsurance@fresnocountyca.gov), stating that such insurance coverage have been obtained and are in full force; that the County of Fresno, its officers, agents and employees will not be responsible for any premiums on the policies; that such Commercial General Liability insurance names the County of Fresno, its officers, agents and employees, individually and collectively, as additional insured, but only insofar as the operations under this Agreement are concerned; that such coverage for additional insured shall apply as primary insurance and any other insurance, or self-insurance, maintained by County, its officers, agents and employees, shall be excess only and not contributing with insurance provided under Contractor's policies herein; and that this insurance shall not be cancelled or changed without a minimum of thirty (30) days advance, written notice given to County. **Certificates of insurance are to include the contract number at the top of the first page.**

In the event Contractor fails to keep in effect at all times insurance coverage as herein provided, the County may, in addition to other remedies it may have, suspend or terminate this Agreement upon the occurrence of such event.

All policies shall be with admitted insurers licensed to do business in the State of California. Insurance purchased shall be purchased from companies possessing a current A.M. Best, Inc. rating of A FSC VII or better.

## BID INSTRUCTIONS

1. All prices and notations must be typed or written in ink.
2. Unless otherwise noted, prices shall remain firm for 180 days after the closing date of the bid.
3. Proposals must be electronically submitted on the forms provided in this RFP with all pages numbered.
4. Additional material may be submitted with the proposal as attachments. Any additional descriptive material that is used in support of any information in your proposal must be referenced by the appropriate paragraph(s) and page number(s).
5. Bidders must electronically submit their proposal in .pdf format, no later than the proposal closing date and time as stated on the front of this document, to the Bid Page on Public Purchase. The County will not be responsible for and will not accept late bids due to slow internet connection or incomplete transmissions.
6. County of Fresno will not be held liable for any costs incurred by vendors in responding to this RFP.
7. Bidders are instructed not to submit confidential, proprietary and related information within the request for proposal. If you are submitting trade secrets, it must be electronically submitted in a separate PDF file clearly named "TRADE SECRETS" and marked as Confidential, see Trade Secret Acknowledgement section.
8. If a bidder finds any discrepancies or has any questions, submit all inquiries to the Bid Page on Public Purchase or contact **Margo Jacobie** at (559) 600-7110. Any change in the RFP will be made only by written addendum issued by the County. The County will not be responsible for any other explanations or interpretations.
9. Failure to respond to all questions or to not supply the requested information could result in rejection of your proposal. Merely offering to meet the specifications is insufficient and will not be accepted. Each bidder shall submit a complete proposal with all information requested.
10. Proposals received after the closing date and time will NOT be considered.
11. Proposals will be evaluated by an evaluation team led by County Purchasing and may consist of County of Fresno department staff, community representatives from advisory boards, and other members as appropriate. If a proposal does not respond adequately to the RFP or the bidder is deemed unsuitable or incapable of delivering services, the proposal may be eliminated from consideration. Upon review and evaluation, the evaluation team will make the final recommendation to the County department.
12. Appeals must be submitted in writing within seven (7) working days after notification of proposed recommendations for award. A "Notice of Award" is not an indication of County's acceptance of an offer made in response to this RFP. Appeals shall be submitted to County of Fresno Purchasing, 333 W. Pontiac Way, Clovis, CA 93612 and in Word format to [gcornuelle@FresnoCountyCA.gov](mailto:gcornuelle@FresnoCountyCA.gov). Appeals should address only areas regarding RFP contradictions, procurement errors, proposal rating discrepancies, legality of procurement context, conflict of interest, and inappropriate or unfair competitive procurement grievance regarding the RFP process.

Purchasing will provide a written response to the complainant within seven (7) working days unless the complainant is notified more time is required. If the appealing bidder is not satisfied with the decision of Purchasing, bidder shall have the right to appeal to the County Administrative Office within seven (7) working days after Purchasing's notification; if the appealing bidder is not satisfied with CAO's decision, the final appeal is with the Board of Supervisors. Please contact Purchasing if the appeal will be going to the Board of Supervisors.

13. All communication regarding this RFP shall be directed to an authorized representative of County Purchasing. The specific Analyst managing this RFP is identified on the cover page, along with his or her contact information, and he or she should be the primary point of contact for discussions or information pertaining to the RFP. Contact with any other County representative, including elected officials, for the purpose of discussing this RFP, its content, or any other issue concerning it, is prohibited unless authorized by Purchasing. Violation of this clause, by the vendor having unauthorized contact (verbally or in writing) with such other County representatives, may constitute grounds for rejection by Purchasing of the vendor's quotation.

The above stated restriction on vendor contact with County representatives shall apply until the County has awarded a purchase order or contract to a vendor or vendors, except as follows. First, in the event that a vendor initiates a formal appeal against the RFP, such vendor may contact the Purchasing Manager who manages that appeal as outlined in the County's established appeal procedures. All such contact must be in accordance with the sequence set forth under the appeal procedures. Second, in the event a public hearing is scheduled before the Board of Supervisors to hear testimony prior to its approval of a purchase order or contract, any vendor may address the Board at scheduled Board Meeting.

## SCOPE OF WORK

The County of Fresno, on behalf of the Department of Social Services (DSS), is soliciting proposals from qualified bidders to provide specialized assessments for Limited English Proficiency (LEP), Learning Disability Evaluations (LDE), and Independent Assessments (third-party review) to CalWORKs WTW participants, in accordance with the Welfare and Institutions Code (WIC) Division 9, Part 3, Chapter 2, Article 3.2, sections 11325.25 and 11325.4.

### ELIGIBLE ENTITIES

DSS will consider funding for entities that have a history of success in providing such assessments. Eligible bidders must be legally established entities and may include, but are not limited to, the following: government agencies, non-profit corporations, private for-profit organizations, partnerships, or sole proprietors, and/or faith-based organizations. Experience working with low-income populations from a social services perspective is not required but preferred.

### TERM OF SERVICE

The initial term of this agreement will be for one (1) year and six (6) months, from January 1, 2023 to June 30, 2024 with an option to renew for a maximum of three (3) additional one (1) year extensions. The maximum agreement term shall be four (4) years and six (6) months, provided the optional one-year extensions are renewed, adequate funding is available, and contracted services continue to meet established benchmarks and the needs of Fresno County WTW participants.

### TARGET POPULATION

The target population will be CalWORKs WTW participants. The CalWORKs program provides temporary financial assistance and employment services to needy families with dependent children. The program is designed to assist families in their path towards work and self-sufficiency. These participants may face numerous barriers relating to limited English proficiency and potential learning disabilities, as disclosed by the participant or as suspected by DSS following a screening at WTW appraisal. The anticipated demographic is approximately 80% female, 50% Hispanic, 12% non-English speaking, with the primary group between 20-30 years of age.

### REQUIRED VENDOR RESPONSIBILITIES

- Perform Limited English Proficiency (LEP) Assessments

WTW participants exhibiting limited or non-English speaking ability will be referred for LEP assessments. The majority of participants will have a primary language of Spanish, but additional languages are anticipated. Historically, LEP assessments have been conducted most frequently in the following primary languages: Spanish (69%), Arabic (11%), Armenian (5%), Hmong (3%), Farsi (3%), and Russian (3%).

- Perform Learning Disability Evaluation (LDE) Assessments

WTW participants are screened for learning disabilities at appraisal. If it is suspected they have a learning disability, they will be offered a LDE referral. However, a referral may be sent at any time as requested by the participant or as deemed appropriate by DSS. Common signs that DSS staff may use to determine if a participant may have a learning disability include, but are not limited to, difficulty reading, listening, understanding directions, writing, spelling, doing math, organizing things, getting along with others, expressing ideas out loud, or paying attention. These factors are used to determine a referral after appraisal or assessment. DSS is required to offer this service to participants in accordance with CalWORKs regulation (MPP 42-711.58).

- Provide Independent Assessments (Third Party Review)

This is an impartial third-party review of WTW Plans developed by DSS staff. These are performed upon specific request from DSS if a participant disagrees with the results of their DSS assessment or WTW Plan. In the past, this service has been requested infrequently. DSS is required to offer this service to participants in accordance with CalWORKs regulation (MPP 42-711.556).

The requested assessment services for LEP, LDE, and Third Party Review are meant to identify participants' strengths and weaknesses by assessing their natural talents, ability to follow verbal and written information, achievements, and job and education interests with the goal of recommending appropriate school and/or work accommodations. Results from the assessments will assist participants in making informed decisions about their educational, vocational, and/or employment goals based on the overall evaluation of their aptitude, academic abilities, vocational skills, and appropriate career planning.

The assessment reports for LEP, LED, and Third Party Review will also be used in the development of the participant's WTW Plan and to determine whether a participant should be exempt from WTW participation. The report shall include, but is not limited to: A summary of the participant's assessment results, findings and condition, areas of strengths and weaknesses, general aptitude and cognitive level, language competency, relevant educational and vocational history and interests, short/long-term employment goals, vocational recommendations, employment market information, local resources, recommendations for additional supportive services, and documentation of recommended accommodations.

**ADDITIONAL VENDOR RESPONSIBILITIES**

Although optional, the following presentations and materials will be requested of the selected bidder(s) for LDE assessments only. Preference may be given to bids that indicate the ability to provide these services. The cost schedule should clearly describe the bidder's capacity in providing the following:

Conduct informational training presentations for DSS staff

These are meant to educate staff on how to identify a potential learning disability as well as inform them of the breadth of services offered by the vendor. Presentations are generally requested 5 times a year. They may be performed in person or virtually.

Develop and provide informational presentations for the DSS WTW Job Readiness program, Job Work Inspires Self-Empowerment (JobWISE)

Presentations are requested twice a month and are held through Zoom. They are generally no longer than 30 minutes. This opportunity will allow the vendor to inform participants of the services offered and encourage them to seek services if they need accommodations to complete their program and find suitable employment.

Produce New WTW Client Orientation Video

A recorded informational video to be presented to participants during their WTW Orientation. The purpose of the video is to give participants a brief definition of a learning disability, what to expect when they attend their evaluation, and how the results of an evaluation can help them in the future. Updates to the video may be requested annually.

**STAFF REQUIREMENTS**

The selected bidder(s) must have trained and qualified professionals who have experience working with adults with barriers to employment. Upon selection, bidder(s) are required to provide a list of job descriptions and staff qualifications that meet the below requirements.

Learning disability evaluation professionals with whom DSS may contract include, but are not limited to, qualified individuals from the following sources:

- A. Professional private/corporate contractors or providers;
- B. Trained and qualified staff at community/state colleges or universities;
- C. Trained and qualified staff from community-based organizations that service individuals with learning disabilities;
- D. Trained and qualified staff from adult educational facilities; or
- E. Staff from the Department of Rehabilitation.

Limited English proficiency professionals with whom DSS may contract include, but are not limited to, qualified individuals who are:

- A. Certified or licensed by the State of California to administer English proficiency assessments;
- B. ESL instructor and/or vocational assessor; or
- C. Job developer with experience placing LEP individuals.

**ANTICIPATED SERVICE VOLUME**

The need for services fluctuates based on participant demand. Annually, it is estimated that approximately 260 referrals (110 LEP and 150 LDE) will be made and approximately 140 assessments (75 LEP and 65 LDE) will be completed. Although DSS cannot guarantee the exact number, assessments may be needed beyond this amount. Compensation may be provided for participants who do not present for their appointment (“no-shows”) or cancel prior to their appointment. Preference may be given to bids that do not bill for no-shows or cancellations. Bidders should specify their cancellation policy in their Cost Proposal narrative. Currently, the program experiences an overall “no-show” rate of 30% for LEP assessments and 50% for LDE. Bidders should clearly describe their capacity in providing the required number of assessments.

Historical number of referrals and assessments performed for DSS are as follows:

<b>Total</b>	FY 18-19	FY 19-20	FY 20-21	FY 21-22
Referrals	497	345	188	239
Assessments	285	183	97	137

<b>LEP</b>	FY 18-19	FY 19-20	FY 20-21	FY 21-22
Referrals	210	146	77	111
Assessments	145	90	53	81

<b>LDE</b>	FY 18-19	FY 19-20	FY 20-21	FY 21-22
Referrals	287	199	111	128
Assessments	140	93	44	56

**SERVICE LOCATION AND DELIVERY**

The selected bidder(s) shall:

- A. Provide assessments in-person. Preference may be given to bids that indicate the ability to also offer supplemental online access to rural clients, as identified by DSS upon referral. Online access is defined as the ability to provide assessments through secure live video sessions.
- B. Have a central site in metro Fresno and the ability to provide remote services through a mobile team throughout Fresno County’s geographical boundaries, including rural locations. DSS also has various rural sites that can accommodate in-person remote services as mutually agreed upon on an ongoing basis.
- C. Develop and provide necessary test materials for oral testing and/or written assessments using recognized and validated evaluation tools.
- D. Have available appointments for participants to schedule within two-weeks from initial referral date.

- E. Provide services in a linguistically appropriate manner, including by providing translation or interpreting services as needed. Any translation or interpreting costs that may be incurred in the performance of these services may be billed to DSS as part of the assessment services. Preference may be given to bidders who employ Spanish-speaking staff who can provide services without the use of interpreters.

**REPORTING AND DOCUMENTATION RESPONSIBILITY**

The selected bidder(s) will be required to:

- A. Meet with DSS quarterly for performance monitoring, or as requested.
- B. Submit monthly reports to DSS that will include, but may not be limited to, invoices, including all fees for services provided, and a Monthly Activity Report (MAR) detailing referral and assessment numbers. DSS may request other relevant data.
- C. Based upon the assessments for LEP, LDE, and Third Party Review, submit realistic and individualized assessment reports in cooperation with the participant within ten business days of date of assessment.
- D. Maintain adequate files and records to meet all record retention and reporting requirements.

## **SCOPE OF WORK PROPOSAL REQUIREMENTS**

Pursuant to instructions included in this RFP, Proposal Content Requirements, a bidder’s proposal will specifically respond to the following items. Proposal narratives must be 12 pages or less in total. The page count for Exhibit A: Cost Proposal does not count against this limit.

### **1. SERVICES**

Describe how your agency proposes to carry out the requested services. Include:

- the process for scheduling participants,
- the length of time between initial referral and contact with participant,
- the strategies used to contact hard to reach participants,
- the length of time necessary for an average assessment,
- the number of assessments that can be conducted per month, and
- the proposed service schedule that works best within your business operations.

Describe the location(s) of the proposed service site(s). Include:

- a. if the required space is currently available,
- b. details about your facility, and
- c. how the proposed location will meet the needs of the target population.

Describe if your agency will be able to provide the optional additional requested services. If so, specify which, and, as applicable, include your agency’s plan to:

- a. train DSS staff,
- b. present to DSS contracted service providers, and/or
- c. provide an informational participant video.

Describe how your agency will ensure adherence to the service implementation date of January 1, 2023 and provide an implementation timeline.

Provide any additional information regarding the requested services.

### **2. ORGANIZATION AND STAFF QUALIFICATIONS**

Provide a summary of your agency’s previous experience in providing assessments.

Describe your agency’s staff who will carry out the requested services. Include:

- a. if staffing is currently available, and
- b. relevant staff experience, qualifications, and certification or licensing for administrative and/or fiscal staff.

Describe how your agency will provide oversight/supervision of staff.

Describe how your agency will ensure that cultural and/or linguistic sensitivity is included in all aspects of program planning and service delivery.

### **3. DOCUMENTATION AND RECORD KEEPING**

Describe your agency’s process for:

- a. documenting participant assessment outcomes,
- b. the parties responsible for documentation, and
- c. the time allocated for documentation.

Describe your agency's ability to:

- a. maintain and secure confidential records,
- b. collect data consistently, and
- c. track qualitative and quantitative outcomes.

Describe your agency's planned method to securely provide DSS with:

- a. monthly activity reports,
- b. monthly invoices, and
- c. participant assessment reports. Include how often reports will be provided.

## **AWARD CRITERIA**

All proposals will be evaluated using the same criteria. While cost is important, other factors are also significant, and the County may not select the lowest cost proposal. The objective is to choose the proposal that offers the highest quality services and will best achieve the County's goals and objectives within a reasonable budget. Evaluations will be based on the criteria listed below:

### **COST**

- As submitted on the Exhibit A: Cost Proposal attachment.

### **CAPABILITY AND QUALIFICATIONS**

- Does the bidder provide information that demonstrates their experience, qualifications, and capacity to provide the requested services?
- Does the bidder demonstrate knowledge or awareness of the problems associated with providing the requested services to the target population?
- Does the bidder demonstrate knowledge of the laws, regulations, statutes, and effective operating principles required to provide this service?

### **LOCATION AND SERVICE DELIVERY**

- Does the bidder describe locations and a service delivery plan that meet the requirements outlined in the "SCOPE OF WORK"?

### **ADDITIONAL SERVICES**

- Does the bidder describe their ability to provide additional services relating to DSS staff trainings and client presentations?

## PROPOSAL CONTENT REQUIREMENTS

It is required that the vendor submit his/her proposal in accordance with the format and instructions provided under this section.

- A. RFP PAGE 1 AND ADDENDUM(S) PAGE 1 (IF APPLICABLE) completed and signed by participating individual or agency.
- B. COVER LETTER: A one-page cover letter and introduction including the company name and address of the bidder and the name, address and telephone number of the person or persons to be used for contact and who will be authorized to make representations for the bidder.
  - a. Whether the bidder is an individual, partnership or corporation shall also be stated. It will be signed by the individual, partner, or an officer or agent of the corporation authorized to bind the corporation, depending upon the legal nature of the bidder. A corporation submitting a proposal may be required before the contract is finally awarded to furnish a certificate as to its corporate existence, and satisfactory evidence as to the officer or officers authorized to execute the contract on behalf of the corporation.
- C. TABLE OF CONTENTS
- D. CONFLICT OF INTEREST STATEMENT: The Contractor may become involved in situations where conflict of interest could occur due to individual or organizational activities that occur within the County. **The Contractor must provide a statement addressing the potential, if any, for conflict of interest and indicate plans, if applicable, to address potential conflict of interest.** This section will be reviewed by County Counsel for compliance with conflict of interest as part of the review process. The Contractor shall comply with all federal, state and local conflict of interest laws, statutes and regulations.
- E. TRADE SECRET:
  - a. Sign where required.
- F. CERTIFICATION – DISCLOSURE – CRIMINAL HISTORY & CIVIL ACTIONS
- G. REFERENCES
- H. PARTICIPATION
- I. EXCEPTIONS: This portion of the proposal will note any exceptions to the requirements and conditions taken by the bidder. If exceptions are not noted, the County will assume that the bidder's proposals meet those requirements. The exceptions shall be noted as follows:
  - a. Exceptions to General Conditions.
  - b. Exceptions to General Requirements.
  - c. Exceptions to Specific Terms and Conditions.
  - d. Exceptions to Scope of Work and/or Scope of Work Proposal Requirements.
  - e. Exceptions to Proposal Content Requirements.
  - f. Exceptions to any other part of this RFP.
- J. VENDOR COMPANY DATA: This section should include:
  - a. A narrative which demonstrates the vendor's basic familiarity or experience with problems associated with this service/project.

- b. Descriptions of any similar or related contracts under which the bidder has provided services.
- c. Descriptions of the qualifications of the individual(s) providing the services.
- d. Any material (including letters of support or endorsement) indicative of the bidder's capability.
- e. A brief description of the bidder's current operations, and ability to provide the services.
- f. Copies of the audited Financial Statements for the last three (3) years for the agency or program that will be providing the service(s) proposed. If audited statements are not available, compiled or reviewed statements will be accepted with copies of three years of corresponding federal tax returns. This information is to be provided after the RFP closes, if requested. **Do not provide with your proposal.**
- g. Describe all contracts that have been terminated before completion within the last five (5) years:
  - i. Agency contract with
  - ii. Date of original contract
  - iii. Reason for termination
  - iv. Contact person and telephone number for agency
- h. Describe all lawsuit(s) or legal action(s) that are currently pending; and any lawsuit(s) or legal action(s) that have been resolved within the last five (5) years:
  - i. Location filed, name of court and docket number
  - ii. Nature of the lawsuit or legal action
- i. Describe any payment problems that you have had with the County within the past three (3) years:
  - i. Funding source
  - ii. Date(s) and amount(s)
  - iii. Resolution
  - iv. Impact to financial viability of organization.

K. SCOPE OF WORK:

- a. Bidders are to use this section to describe the essence of their proposal.
- b. This section should be formatted as follows:
  - i. A general discussion of your understanding of the project, the Scope of Work proposed and a summary of the features of your proposal.
  - ii. A detailed description of your proposal as it relates to each item listed under the "Scope of Work Proposal Requirements" section of this RFP. Bidder's response should be stated in the same order as are the "Scope of Work Proposal Requirements" items. Each description should begin with a restatement of the "Scope of Work Proposal Requirements" item that it is addressing. Bidders must explain their approach and method of satisfying each of the listed items.
- c. When reports or other documentation are to be a part of the proposal a sample of each must be submitted. Reports should be referenced in this section and submitted in a separate section entitled "REPORTS."
- d. A complete description of any alternative solutions or approaches to accomplishing the desired results.

- L. COST PROPOSAL: Proposals may be prepared in any manner to best demonstrate the worthiness of your proposal. Include details and rates/fees for all services, materials, equipment, etc. to be provided or optional under the proposal.
- M. CHECK LIST

## TRADE SECRET ACKNOWLEDGEMENT

Each proposal submitted is public record under the California Public Records Act (Cal. Gov. Code, secs. 6250 and following) and is therefore open to inspection by the public as required by Section 6253 of the California Government Code. This section generally states that "every person has a right to inspect any public record". The County will not exclude any proposal or portion of a proposal from treatment as a public record except information that it is properly submitted as a "trade secret" (defined below), and determined by the County to be a "trade secret" (if not otherwise subject to disclosure, as stated below). Information submitted as "proprietary", "confidential" or under any other terms that might state or suggest restricted public access will not be excluded from treatment as public record.

"Trade secrets" as defined by Section 6254.7 of the California Government Code are not treated as a public record under that section. This section defines trade secrets as:

*"...Trade secrets," as used in this section, may include, but are not limited to, any formula, plan, pattern, process, tool, mechanism, compound, procedure, production data or compilation of information that is not patented, which is known only to certain individuals within a commercial concern who are using it to fabricate, produce, or compound an article of trade or a service having commercial value and which gives its user an opportunity to obtain a business advantage over competitors who do not know or use it."*

Such information must be submitted in a separate PDF file named "Trade Secret" and marked as "Confidential" in the Public Purchase system. Bidders must include a clear and concise statement that sets out the reasons for confidentiality in accordance with the foregoing definition of "trade secret." Examples of information not considered trade secrets are pricing, cover letter, promotional materials, references, and the like.

Information submitted by a bidder as "trade secret" will be reviewed by County of Fresno's Purchasing Division, with the assistance of the County's legal counsel, to determine conformance or non-conformance to the foregoing definition.

Information that is properly identified as "trade secret" and which the County determines to conform to the definition will not become public record (if not otherwise subject to disclosure, as stated below). The County will safeguard this information in an appropriate manner, provided however, in the event of a request, demand, or legal action by any person or entity seeking access to the "trade secret" information, the County will inform the bidder of such request, demand, or legal action, and the bidder shall defend, indemnify, and hold harmless the County, including its officers and employees, against any and all claims, liabilities, damages, or costs or expenses, including attorney's fees and costs, relating to such request, demand or legal action, seeking access to the "trade secret" information.

Information submitted by bidder as trade secret and determined by the County not to be in conformance with the foregoing California Government Code definition shall be excluded from the proposal and deleted by the County.

The County shall not in any way be liable or responsible for the disclosure of any proposals or portions thereof, if (1) they are not electronically submitted in a separate PDF that is marked "Trade Secret" and marked as Confidential in the Public Purchase system; or (2) disclosure thereof is required or allowed under the law or by order of court.

Bidders are advised that the County does not wish to receive trade secrets and that bidders are not to supply trade secrets unless they are absolutely necessary.

I have read and understand, and agree to the above "Trade Secret Acknowledgement."

### BIDDER MUST CHECK ONE OF THE FOLLOWING:

Has bidder submitted certain bid information that is a "trade secret," as defined by Section 6254.7 of the California Government Code, and in compliance with the requirements of this Trade Secrets Acknowledgement?

By marking "NO", bidder does not claim any confidentiality of any bid information submitted to the County.

YES       NO

### ACKNOWLEDGED AND AGREED BY BIDDER:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

## **DISCLOSURE – CRIMINAL HISTORY & CIVIL ACTIONS**

In their proposal, the bidder is required to disclose if any of the following conditions apply to them, their owners, officers, corporate managers and partners (hereinafter collectively referred to as “Bidder”):

1. Within the three-year period preceding the proposal, they have been convicted of, or had a civil judgment rendered against them for:
  - a. fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction;
  - b. violation of a federal or state antitrust statute;
  - c. embezzlement, theft, forgery, bribery, falsification, or destruction of records; or
  - d. false statements or receipt of stolen property
2. Within a three-year period preceding their proposal, they have had a public transaction (federal, state, or local) terminated for cause or default.

Disclosure of the above information will not automatically eliminate a Bidder from consideration. The information will be considered as part of the determination of whether to award the contract and any additional information or explanation that a Bidder elects to submit with the disclosed information will be considered. If it is later determined that the Bidder failed to disclose required information, any contract awarded to such Bidder may be immediately voided and terminated for material failure to comply with the terms and conditions of the award.

Any Bidder who is awarded a contract must sign an appropriate Certification Regarding Debarment, Suspension, and Other Responsibility Matters. Additionally, the Bidder awarded the contract must immediately advise the County in writing if, during the term of the agreement: (1) Bidder becomes suspended, debarred, excluded or ineligible for participation in federal or state funded programs or from receiving federal funds as listed in the excluded parties list system (<http://www.epls.gov>); or (2) any of the above listed conditions become applicable to Bidder. The Bidder will indemnify, defend and hold the County harmless for any loss or damage resulting from a conviction, debarment, exclusion, ineligibility or other matter listed in the signed Certification Regarding Debarment, Suspension, and Other Responsibility Matters.

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER  
RESPONSIBILITY MATTERS - PRIMARY COVERED TRANSACTIONS**INSTRUCTIONS FOR CERTIFICATION

1. By signing and submitting this proposal, the prospective primary participant is providing the certification set out below.
2. The inability of a person to provide the certification required below will not necessarily result in denial of participation in this covered transaction. The prospective participant shall submit an explanation of why it cannot provide the certification set out below. The certification or explanation will be considered in connection with the department or agency's determination whether to enter into this transaction. However, failure of the prospective primary participant to furnish a certification or an explanation shall disqualify such person from participation in this transaction.
3. The certification in this clause is a material representation of fact upon which reliance was placed when the department or agency determined to enter into this transaction. If it is later determined that the prospective primary participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency may terminate this transaction for cause or default.
4. The prospective primary participant shall provide immediate written notice to the department or agency to which this proposal is submitted if at any time the prospective primary participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
5. The terms covered transaction, debarred, suspended, ineligible, participant, person, primary covered transaction, principal, proposal, and voluntarily excluded, as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549. You may contact the department or agency to which this proposal is being submitted for assistance in obtaining a copy of those regulations.
6. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

### CERTIFICATION

(1) The prospective primary participant certifies to the best of its knowledge and belief, that it, its owners, officers, corporate managers and partners:

- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency;
- (b) Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c) Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.

(2) Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Signature: \_\_\_\_\_

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

\_\_\_\_\_  
(Printed Name & Title)

\_\_\_\_\_  
(Name of Agency or Company)

# REFERENCE LIST

## VENDOR MUST COMPLETE AND RETURN WITH REQUEST FOR PROPOSAL

Firm: \_\_\_\_\_

Provide a list of at least five (5) customers for whom you have recently provided similar services. If you have held a contract for these or similar services with the County of Fresno within the past seven (7) years, list the County as one of your customers. Please list the person most familiar with your contract. Be sure to include all requested information.

Reference Name: \_\_\_\_\_ Contact: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone No.: ( \_\_\_\_\_ ) \_\_\_\_\_ Project Date: \_\_\_\_\_  
 Service Provided: \_\_\_\_\_

Reference Name: \_\_\_\_\_ Contact: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone No.: ( \_\_\_\_\_ ) \_\_\_\_\_ Project Date: \_\_\_\_\_  
 Service Provided: \_\_\_\_\_

Reference Name: \_\_\_\_\_ Contact: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone No.: ( \_\_\_\_\_ ) \_\_\_\_\_ Project Date: \_\_\_\_\_  
 Service Provided: \_\_\_\_\_

Reference Name: \_\_\_\_\_ Contact: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone No.: ( \_\_\_\_\_ ) \_\_\_\_\_ Project Date: \_\_\_\_\_  
 Service Provided: \_\_\_\_\_

Reference Name: \_\_\_\_\_ Contact: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone No.: ( \_\_\_\_\_ ) \_\_\_\_\_ Project Date: \_\_\_\_\_  
 Service Provided: \_\_\_\_\_

**Failure to provide a list of at least five (5) customers may be cause for rejection of this RFP.**

## PARTICIPATION

The County of Fresno is a member of the California Association of Public Procurement Officials (CAPPO) Central Valley Chapter. This group consists of Fresno, Kern, Kings, and Tulare Counties and all governmental, tax supported agencies within these counties.

Whenever possible, these and other tax supported agencies co-op (piggyback) on contracts put in place by one of the other agencies.

Any agency choosing to avail itself of this opportunity, will make purchases in their own name, make payment directly to the contractor, be liable to the contractor and vice versa, per the terms of the original contract, all the while holding the County of Fresno harmless. If awarded this contract, please indicate whether you would extend the same terms and conditions to all tax supported agencies within this group as you are proposing to extend to Fresno County.

**\* Note: This form/information is not rated or ranked for evaluation purposes.**

Yes, we will extend contract terms and conditions to all qualified agencies within the California Association of Public Procurement Officials (CAPPO) Central Valley Chapter and other tax supported agencies.

No, we will not extend contract terms to any agency other than the County of Fresno.

---

(Authorized Signature)

---

Title

## CHECK LIST

This Checklist is provided to assist vendors in the preparation of their RFP response. Included are important requirements the bidder is responsible to submit with the RFP package in order to make the RFP compliant.

Check off each of the following (*if applicable*):

- Signed cover page of Request for Proposal (RFP).
- Check <http://www.FresnoCountyCA.gov/departments/internal-services/purchasing/bid-opportunities> for any addenda.
- Signed cover page of each Addendum.
- Provide a Conflict of Interest Statement.
- Signed *Trade Secret Form* as provided with this RFP (Trade Secret Information, if provided, must be electronically submitted in a separate PDF file and marked as Confidential).
- Signed *Criminal History Disclosure Form* as provided with this RFP.
- Signed *Participation Form* as provided with this RFP.
- The completed *Reference List* as provided with this RFP.
- Indicate all of bidder exceptions to the County's requirements, conditions and specifications as stated within this RFP.
- Bidder's proposal, in PDF format, electronically submitted to the Bid Page on Public Purchase.

**Return Checklist with your RFP response**

## **EXHIBITS**

### **A. Cost Proposal**

## Exhibit A: Cost Proposal

Bidder or Company Name: \_\_\_\_\_

**Reminder:** As stated in the cost proposal requirements of this RFP, both Sections I and II must be completed.

**Section I: Proposed Cost Per Instance of Service - The fees below should cover your agency's operational costs for the services. Underlined quantities can be guaranteed. Italicized quantities are estimates based on current trends, and actual quantities may be higher or lower.**

**Fee-for-Service Items 7-9 are desired, but optional. If your agency prefers to not offer the service, please enter the price as \$0.00 and explain in the budget narrative in Section II below.**

Fee-for-Service Proposed Rates by Service	Est. Qty. Needed per 12 Months (actual demand will fluctuate)	Term 1 (18 months) January 1, 2023 – June 30, 2024	Optional Term 2 (12 months) July 1, 2024 – June 30, 2025	Optional Term 3 (12 months) July 1, 2025 – June 30, 2026	Optional Term 4 (12 months) July 1, 2026 – June 30, 2027
		Cost per Service	Cost per Service	Cost per Service	Cost per Service
1. Limited English Proficiency (LEP) Report	75				
2. Learning Disability Evaluation (LDE) Report	65				
3. Independent Assessment (Third Party Review) Report	2				
4. Interpreter Services (per minute rate)	1,600				
5. Monthly Activities: Prepare Monthly Invoice/Reports, Ongoing Communication with DSS (limit 12 per year)	<u>12</u>				
6. No-Shows/Cancellations (zero cost preferred)	120				
7. Produce New or Update WTW Client Orientation Video	1				
8. Informational Training Presentations for DSS Staff	<u>5</u>				
9. JobWISE Presentations	<u>24</u>				
<b>ESTIMATED TERM COST (for comparison purposes only)</b>		\$ -	\$ -	\$ -	\$ -
<b>EST. ACCUMULATED TOTAL COST (INCLUDING OPTIONAL TERMS) (for comparison purposes only)</b>		\$ -	\$ -	\$ -	\$ -

**Exhibit A: Cost Proposal**Bidder or Company Name: **Section II. Budget Narrative - Include a brief narrative that explains and justifies the cost per instance of service and any price increases.**

1. Limited English Proficiency (LEP) Report:

2. Learning Disability Evaluation (LDE) Report:

3. Independent Assessment (Third Party Review) Report:

4. Interpreter Services (per minute rate):

5. Monthly Activities (reimbursement is limited to 1 instance of service per month) - Prepare Monthly Invoice/Activity Reports, Ongoing Communication with DSS including contract monitoring meetings, calls, and emails pertaining to service delivery, invoicing, and monthly activity reports:

6. No-Shows/Cancellations (zero cost preferred):

7. Produce New or Update WTW Client Orientation Video:

8. Informational Training Presentations for DSS Staff:

9. JobWISE Presentations:

# COUNTY OF FRESNO



## ADDENDUM NUMBER: ONE (1)

## RFP NUMBER: 23-006

## WELFARE-TO-WORK SPECIALIZED ASSESSMENTS

---

Issue Date: September 13, 2022

Closing Date: September 23, 2022 at 10:00 AM

All Questions and Proposals must be electronically submitted to the Bid Page on Public Purchase.

For assistance, contact Heather Stevens at (559) 600-7110.

---

**NOTE THE ATTACHED ADDITIONS, DELETIONS AND/OR CHANGES TO THE REQUIREMENTS OF REQUEST FOR PROPOSAL NUMBER: 23-006 AND INCLUDE THEM IN YOUR RESPONSE. PLEASE SIGN AND RETURN THIS ADDENDUM WITH YOUR PROPOSAL.**

➤ **Questions and Answers**

**ACKNOWLEDGMENT OF ADDENDUM NUMBER ONE (1) TO RFP 23-006**

COMPANY NAME: \_\_\_\_\_ (PRINT)

SIGNATURE: \_\_\_\_\_

NAME & TITLE: \_\_\_\_\_ (PRINT)

Purchasing Use: HS:st

ORG/Requisition: 56107001 / 5612300136

## QUESTIONS AND ANSWERS

**Q1. Is there a sample of an assessment report that DSS can provide to clarify what is being asked of the vendor?**

A1. *Assessment reports should include results of the assessments, as well as recommendations on appropriate school and work accommodations for individuals' Welfare-to-Work participation. At this time, no samples are available.*

**Q2. Is the billing processed by invoicing or will a third-party medical biller be used?**

A2. *The vendor will send invoices directly to the Department for payment.*

**Q3. When planning for the cost proposal, are there any recommend sources available to help determine the rate?**

A3. *No, there are no recommended sources.*

**Q4. Is the vendor able to determine which LEP assessments to use?**

A4. *Yes. Please refer to page 12 of the RFP for information on assessments.*

**Q5. Is the LEP assessment connected to an LD assessment, or is there another factor to determine if the client is going to receive an LD assessment?**

A5. *The LEP assessments and LD assessments are separate and independent from one another.*

**Q6. Is there a maximum budget for the RFP?**

A6. *No, there is no maximum budget amount recommended. However, as indicated on page 18 of the RFP, cost is evaluated as part of the RFP award criteria.*

**Q7. Is the third-party review performed by the vendor or another party?**

A7. *Third-party review is to be performed by the vendor.*

**Q8. Would the county allow some assessments to take place on county campuses?**

A8. *Yes, but only for assessments in the rural areas. Refer to page 14 of the RFP.*

**Q9. Is there any expectations for treatment or rehabilitation, or is the request for a recommendation of accommodations, treatment, or rehabilitation? Is there an expectation of actually providing those services?**

A9. *The RFP is requesting assessments only. Follow up services are not requested.*

**Q10. Can the budget narrative be more than one page, or is the proposer limited to the one-page template?**

A10. *The budget narrative may be more than one page. Please attach additional pages if needed.*

**Q11. If an appeal is to be submitted, can you confirm [GCornuelle@FresnoCountyCA.gov](mailto:GCornuelle@FresnoCountyCA.gov) is still the proper contact, as noted on page 10 of the RFP?**

*A11. Yes, that is the correct email address.*

**Q12. Will the specialized assessments for Limited English Proficiency (LEP), Learning Disability Evaluations (LDE), and Independent Assessments (third party review) be provided by the County? Or will vendors need to develop their own assessments?**

*A12. Vendors are expected to provide their own assessments. Refer to page 14 of the RFP.*

# COUNTY OF FRESNO



## REQUEST FOR PROPOSAL

NUMBER: 23-006

## WELFARE-TO-WORK SPECIALIZED ASSESSMENTS

Issue Date: August 26, 2022

Closing Date: SEPTEMBER 23, 2022 AT 10:00 A.M.

All Questions and Responses must be electronically submitted on the Bid Page on Public Purchase.

For assistance, contact Margo Jacobie at Phone (559) 600-7110.

### BIDDER TO COMPLETE

Undersigned agrees to furnish the commodity or service stipulated in the attached at the prices and terms stated in this RFP.  
Bid must be signed and dated by an authorized officer or employee.

Foster Assessment Center & Testing Service, Inc.

COMPANY

Andrea Foster

CONTACT PERSON

516 Pennsfield Place, Suite #108

ADDRESS

Thousand Oaks

CA

91360

CITY

(805) 497-1685

STATE

ZIP CODE

ThousandOaks@FosterAssessment.com

TELEPHONE NUMBER

E-MAIL ADDRESS

*Andrea Foster*

AUTHORIZED SIGNATURE

Andrea Foster

CEO

PRINT NAME

TITLE

# COUNTY OF FRESNO



## ADDENDUM NUMBER: ONE (1)

RFP NUMBER: 23-006

## WELFARE-TO-WORK SPECIALIZED ASSESSMENTS

---

Issue Date: September 13, 2022

Closing Date: September 23, 2022 at 10:00 AM

All Questions and Proposals must be electronically submitted to the Bid Page on Public Purchase.

For assistance, contact Heather Stevens at (559) 600-7110.

---

NOTE THE ATTACHED ADDITIONS, DELETIONS AND/OR CHANGES TO THE REQUIREMENTS OF REQUEST FOR PROPOSAL NUMBER: 23-006 AND INCLUDE THEM IN YOUR RESPONSE. PLEASE SIGN AND RETURN THIS ADDENDUM WITH YOUR PROPOSAL.

➤ Questions and Answers

### ACKNOWLEDGMENT OF ADDENDUM NUMBER ONE (1) TO RFP 23-006

COMPANY NAME: Poster Assessment Center & Testing Service, Inc.  
SIGNATURE:   
NAME & TITLE: Andrea Foster, CEO

Purchasing Use: HS:st

ORG/Requisition: 56107001 / 5612300136

**B. COVER LETTER**

*by*  
***Foster Assessment Center & Testing Service, Inc. (FACTS)***

Administrative location: 516 Pennsfield Place, Suite #108, Thousand Oaks, CA 91360,  
Telephone: (805) 497 1685, Fax (805) 497-2525

Foster Assessment Center & Testing Service, Inc. (FACTS) is an S Corporation owned jointly 50% by Andrea Foster and 50% by R. Craig Foster.

Doing business as (dba): Foster Assessment Center & Testing Service, Inc. (FACTS) since January 1, 1984, and Incorporated in 2002.

Federal Tax I.D.#: 75-3066677      State Employer Tax I.D.#: 310-6867-9

Authorized signatures of individuals able to execute a contract on behalf of Foster Assessment Center & Testing Service, Inc. (FACTS):



Andrea Foster, MA, CVE, ABVE,  
PVE, IPFC  
Chief Executive Officer (C.E.O.)  
Co-Owner



Katie Foster, MA  
Chief Operations Officer (C.O.O.)

09/21/2022

Date

09/21/2022

Date

State of California  
Secretary of State

CERTIFICATE OF STATUS

ENTITY NAME:

FOSTER ASSESSMENT CENTER AND TESTING SERVICES, INC.

FILE NUMBER: C2399475  
FORMATION DATE: 05/31/2002  
TYPE: DOMESTIC CORPORATION  
JURISDICTION: CALIFORNIA  
STATUS: ACTIVE (GOOD STANDING)

I, DEBRA BOWEN, Secretary of State of the State of California,  
hereby certify:

The records of this office indicate the entity is authorized to  
exercise all of its powers, rights and privileges in the State of  
California.

No information is available from this office regarding the financial  
condition, business activities or practices of the entity.



IN WITNESS WHEREOF, I execute this certificate  
and affix the Great Seal of the State of  
California this day of January 07, 2013.

*Debra Bowen*

DEBRA BOWEN  
Secretary of State

RKS

## C. ***TABLE OF CONTENTS***

	<u>PAGE</u>
A. RFP PAGE 1 AND ADDENDUM .....	1
B. COVER LETTER.....	3
C. TABLE OF CONTENTS .....	5
D. CONFLICT OF INTEREST STATEMENT .....	7
E. TRADE SECRET .....	8
F. CERTIFICATION – DISCLOSURE – CRIMINAL HISTORY & CIVIL ACTIONS.....	9
G. REFERENCES .....	10
H. PARTICIPATION .....	11
I. EXCEPTIONS .....	12
J. VENDOR COMPANY DATA .....	13
a. Company Narrative .....	13
b. Related Contracts & Services.....	17
c. Staff Qualifications .....	21
d. Letters of Support or Endorsement .....	24
e. Current Operations .....	36
f. Financial Statements (to be provided upon request).....	50
g. Terminated Contracts .....	50
h. Lawsuit(s) or Legal Action(s) .....	50
i. Payment Problems.....	50
K. SCOPE OF WORK.....	51
a. Essence of Proposal.....	51
b. Formatting of Scope of Work .....	51
i. General Discussion of Scope of Work Proposed .....	51
ii. Scope of Work Proposal Requirements.....	51
1. Services .....	51

a.	Process to Carry Out the Requested Services .....	51
b.	Location(s) of the Proposed Service Site(s) .....	53
c.	Ability to Provide Additional Requested Services.....	54
d.	Adherence to Implementation Date.....	55
e.	Additional Information Regarding Services .....	55
2.	Organization and Staff Qualifications .....	55
a.	Summary of Previous Experience .....	55
b.	Staff for Requested Services.....	56
c.	Oversight/Supervision of Staff.....	57
d.	Ensure Cultural and/or Linguistic Sensitivity .....	57
3.	Documentation and Record Keeping .....	58
a.	Process for Documentation.....	58
b.	Ability to Maintain, Collect and Track Data.....	59
c.	Provide DSS Activity Reports and Invoices .....	60
c.	Reports.....	61
d.	Alternative Solutions or Approaches for Desired Results .....	61
L.	COST PROPOSAL.....	63
M.	CHECK LIST .....	66

ADDENDUMS

1.	REPORTS.....	67
a.	Limited English Proficiency Assessment Sample Report.....	67
b.	Learning Disability Evaluation Sample Report .....	71
c.	Independent Assessment Sample Report .....	79
2.	Training Presentation for DSS Staff .....	80
3.	Training Presentation for Job Readiness Participants.....	128
4.	Resumes.....	150
5.	Organizational Chart .....	175
6.	Assessment Instruments .....	176
7.	Fresno County Demand Occupations List (2022-2023).....	213
8.	Fresno County Demand Jobs Summary (2022-2023) .....	217
9.	CARF Survey Report .....	218
10.	Fresno County Participant Satisfaction Feedback Summary .....	236
11.	Fresno County Job Specialist Satisfaction Feedback Summary.....	248
12.	Limited English Proficiency Assessment Flyer (English).....	254
13.	Limited English Proficiency Assessment Flyer (Spanish) .....	255
14.	Learning Disability Evaluation Brochure (English).....	256
15.	Learning Disability Evaluation Brochure (Spanish).....	258
16.	FACTS Fresno Center Map .....	260
17.	Monthly Activity Reports - LEP, LD & NENS.....	261
18.	Performance Measure Outcomes Chart .....	268

## D. CONFLICT OF INTEREST STATEMENT

Foster Assessment Center & Testing Service, Inc. (FACTS) acknowledges there is currently no conflict of interest with our company and the County of Fresno. However, we acknowledge there is always a potential to become involved in situations where conflict of interest could occur due to individual or organizational activities that occur within the County. Foster Assessment Center & Testing Service, Inc. has provided the below statement to address the potential, if any, for conflict of interest and indicate plans. The Contractor shall comply with all federal, state and local conflict of interest laws, statutes and regulations.

FACTS understands the purpose of the conflict of interest policy is to protect both the County of Fresno and Foster Assessment Center & Testing Service, Inc.'s interest when contemplating entering into a transaction or arrangement that might benefit the private interest of one of its officers or directors, or that might otherwise result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable federal, state, local conflict of interest laws, statutes and regulations applicable to corporations, and is not intended as an exclusive statement of responsibilities.

FACTS understands and agrees to the following inclusive provisions:

1. Employees of the County or public agencies for which the Board of Supervisors is the governing body.
2. Profit-making firms or businesses in which employees described in Subsection (1) serve as officers, principals, partners or major shareholders.
3. Persons who, within the immediately preceding twelve (12) months, came within the provisions of Subsection (1), and who were employees in positions of substantial responsibility in the area of service to be performed by the contract, or participated in any way in developing the contract or its service specifications.
4. Profit-making firms or businesses in which the former employees described in Subsection (3) serve as officers, principals, partners or major shareholders.
5. No County employee, whose position in the County enables him to influence the selection of a contractor for this RFP, or any competing RFP, and no spouse or economic dependent of such employee, shall be employees in any capacity by a bidder, or have any other direct or indirect financial interest in the selection of a contractor.
6. In addition, no County employee will be employed by the selected vendor to fulfill the vendor's contractual obligations to the County.

The following principal offers agree with the above noted Conflict of Interest Policy, have read the policy and agrees to comply with the policy:

  
\_\_\_\_\_  
Andrea Foster, C.F.O.  
Chief Executive Officer

09/21/2022  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Katie Foster, C.O.O.  
Chief Operations Officer

9/21/2022  
\_\_\_\_\_  
Date

## E. TRADE SECRET ACKNOWLEDGEMENT

Each proposal submitted is public record under the California Public Records Act (Cal. Gov. Code, secs. 6250 and following) and is therefore open to inspection by the public as required by Section 6253 of the California Government Code. This section generally states that every person has a right to inspect any public record. The County will not exclude any proposal or portion of a proposal from treatment as a public record except information that it is properly submitted as a "trade secret" (defined below), and determined by the County to be a "trade secret" (if not otherwise subject to disclosure, as stated below). Information submitted as proprietary, "confidential" or under any other terms that might state or suggest restricted public access will not be excluded from treatment as public record.

"Trade secrets" as defined by Section 6254.7 of the California Government Code are not treated as a public record under that section. This section defines trade secrets as:

*" Trade secrets, as used in this section, may include but are not limited to, any formula, plan, pattern, process, tool, mechanism, compound, procedure, production data or compilation of information that is not patented, which is known only to certain individuals within a commercial concern who are using it to fabricate, produce, or compound an article of trade or a service having commercial value and which gives its user an opportunity to obtain a business advantage over competitors who do not know or use it "*

Such information must be submitted in a separate PDF file named "Trade Secret" and marked as "Confidential" in the Public Purchase system. Bidders must include a clear and concise statement that sets out the reasons for confidentiality in accordance with the foregoing definition of trade secret. Examples of information not considered trade secrets are pricing, cover letter, promotional materials, references, and the like.

Information submitted by a bidder as "trade secret" will be reviewed by County of Fresno's Purchasing Division, with the assistance of the County's legal counsel to determine conformance or non-conformance to the foregoing definition.

Information that is properly identified as "trade secret" and which the County determines to conform to the definition will not become public record (if not otherwise subject to disclosure, as stated below). The County will safeguard this information in an appropriate manner provided however in the event of a request, demand or legal action by any person or entity seeking access to the "trade secret" information the County will inform the bidder of such request, demand or legal action, and the bidder shall defend, indemnify, and hold harmless the County, including its officers and employees against any and all claims, liabilities, damages, or costs or expenses, including attorney's fees and costs, relating to such request, demand or legal action, seeking access to the "trade secret" information.

Information submitted by bidder as trade secret and determined by the County not to be in conformance with the foregoing California Government Code definition shall be excluded from the proposal and deleted by the County.

The County shall not in any way be liable or responsible for the disclosure of any proposals or portions thereof if (1) they are not electronically submitted in a separate PDF that is marked "Trade Secret" and marked as Confidential in the Public Purchase system; or (2) disclosure thereof is required or allowed under the law or by order of court.

Bidders are advised that the County does not wish to receive trade secrets and that bidders are not to supply trade secrets unless they are absolutely necessary.

I have read and understand and agree to the above "Trade Secret Acknowledgement."

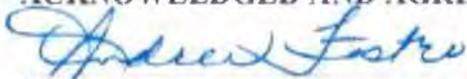
### BIDDER MUST CHECK ONE OF THE FOLLOWING:

Has bidder submitted certain bid information that is a "trade secret," as defined by Section 6254.7 of the California Government Code, and in compliance with the requirements of this Trade Secrets Acknowledgement?

By marking "NO" bidder does not claim any confidentiality of any bid information submitted to the County.

YES  NO

### ACKNOWLEDGED AND AGREED BY BIDDER:

  
Signature

Andrea Foster  
Print Name

09/21/2022  
Date

Chief Executive Officer (CEO)  
Title

**F. CERTIFICATION**

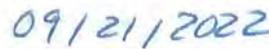
- (1) The prospective primary participant certifies to the best of its knowledge and belief, that it, its owners, officers, corporate managers and partners:
- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency;
  - (b) Have not within a three-year period preceding this proposal been convicted of or had a civil judgement rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  - (c) Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.
- (2) Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Signature:



Andrea Foster, C.E.O.  
Name and Title

Date:



Foster Assessment Center & Testing Service Inc.  
Name of Agency or Company

## G. REFERENCE LIST

Firm: Foster Assessment Center & Testing Service, Inc. (FACTS)

---

Reference Name: **County of Fresno** Contact: **Leah Melidonian, Senior Staff Analyst**  
**Department of Social Services**

Address: 205 W. Pontiac Way, Bld. 2 City: Clovis State: California Zip: 93612

Phone No: (559) 600-3061 Email: [lmelidonian@fresnocountyca.gov](mailto:lmelidonian@fresnocountyca.gov) Date: 2016 to Present

Service Provided: CalWORKs WTW Limited English Proficiency Assessments, Learning Disability Evaluations, & Independent Assessments

---

Reference Name: **County of Kern** Contact: **Elizabeth Rose, Assistant Program Director**  
**Department of Human Services**

Address: P.O. Box 511 City: Bakersfield State: California Zip: 93302

Phone No: (661) 633-7298, Cell (661) 428-5060 Email: [rose@kerndhs.com](mailto:rose@kerndhs.com) Date: 1995 to Present

Service Provided: CalWORKs WTW Vocational Assessments & Learning Disability Evaluations

---

Reference Name: **County of Los Angeles** Contact: **Onica Ross, Program Manager**  
**Department of Public Social Services & Los Angeles County of Education (LACOE)**

Address: 9525 East Imperial Hwy City: Downey State: California Zip: 90242

Phone No: (562) 922-8620 Email: [Ross\\_Onica@lacoedu](mailto:Ross_Onica@lacoedu) Date: 1989 to Present

Service Provided: CalWORKs WTW Vocational Assessments & Learning Disability Evaluations

---

Reference Name: **County of Orange** Contact: **Thu Phan, Contract Administrator**  
**Social Services Agency**

Address: 500 N. State College Blvd., Suite 100 City: Orange State: California Zip: 92868

Phone No: (714) 541-7796, Cell (714) 277-5000 Email: [Thu.Phan@ssa.ocgov.com](mailto:Thu.Phan@ssa.ocgov.com) Date: 1998 to Present

Service Provided: CalWORKs WTW Vocational Assessments & Learning Disability Evaluations

---

Reference Name: **County of Riverside** Contact: **Lee Lor, Program Specialist II**  
**Department of Public Social Services**

Address: 4060 County Circle Dr. City: Riverside State: California Zip: 92503

Phone No: (951) 358-3920 micro 83920 Email: [BLor@RIVCO.ORG](mailto:BLor@RIVCO.ORG) Date: 2015 to Present

Service Provided: CalWORKs WTW Learning Disability Evaluations

---

Reference Name: **County of Ventura** Contact: **Cynthia Alonzo, Program Analyst II**  
**Human Services Agency**

Address: 855 Partridge Drive City: Ventura State: California Zip: 93003

Phone No: (805) 477-5356 Email: [Cynthia.Alonzo@ventura.org](mailto:Cynthia.Alonzo@ventura.org) Date: 2002 to Present

Service Provided: CalWORKs WTW Learning Disability Evaluations

---

## H. PARTICIPATION

The County of Fresno is a member of the California Association of Public Procurement Officials (CAPPO) Central Valley Chapter. This group consists of Fresno, Kern, King, and Tulare Counties and all governmental, tax supported agencies within these counties.

Whenever possible, these and other tax supported agencies co-op (piggyback) on contracts put in place by one of the other agencies.

Any agency choosing to avail itself of this opportunity, will make purchases in their own name, make payment directly to the contractor, be liable to the contractor and vice versa, per the terms of the original contract, all the while holding the County of Fresno harmless. If awarded this contract, please indicate whether you would extend the same terms and conditions to all tax supported agencies within this group as you are proposing to extend to Fresno County.

**\* Note: This form/information is not rated or ranked for evaluation purposes.**



Yes, we will extend contract terms and conditions to all qualified agencies within the California Association of Public Procurement Officials (CAPPO) Central Valley Chapter and other tax supported agencies.



No, we will not extend contract terms to any agency other than the County of Fresno.



(Authorized Signature)

Andrea Foster, Chief Executive Officer,

(C.E.O.)

(Title)

**I. EXCEPTIONS:** *This portion of the proposal will note any exceptions to the requirements and conditions taken by the bidder. If exceptions are not noted, the County will assume that the bidder's proposals meet those requirements. The exceptions shall be noted as follows:*

- A. Exceptions to General Conditions. – **None**
- B. Exceptions to General Requirements. – **None**
- C. Exceptions to Specific Terms and Conditions. – **None**
- D. Exceptions to Scope of Work and/or Scope of Work Proposal Requirements: **None**
- E. Exceptions to Proposal Content Requirements. - **None**
- F. Exceptions to any other part of this RFP. - **None**

## J. VENDOR COMPANY DATA

- a. *A narrative which demonstrates the vendor's basic familiarity or experience with problems associated with this service/project.*

**Foster Assessment Center & Testing Service, Inc. (FACTS)** clearly understands the services to be provided for this contract, as well as the problems associated with the service, as **FACTS is the sole current provider of this contract** for the County of Fresno Department of Social Services, and has been since 2016, conducting hundreds of evaluations in the immediate past years (even during County closures due to the COVID-19 pandemic). FACTS remains exceedingly capable to continue to provide Limited English Proficiency Assessments, Learning Disability Evaluations and Independent Assessments at our central site in metro Fresno, as well as DSS rural sites in Selma and Reedley in addition to online access to rural clients. FACTS has been the **sole assessment and evaluation provider for multiple California County Departments for 30+ years**, thus developing a wealth of knowledge understanding County needs for this program and how we can best meet those needs. FACTS is the **largest provider of assessments** throughout Southern California, providing over 20,000 assessments each year in the Southern California Counties of **Fresno, Los Angeles, Orange, Kern, Riverside, San Bernardino, and Ventura**. Therefore, FACTS can appropriately acknowledge the County's need for an assessment/evaluation program that delivers services by qualified Assessors, with a knowledge of the local labor market and that have access to a wide range of test instruments. FACTS acknowledges that services need to be delivered throughout the County, and reports need to be generated within a few business days in order to assist Job Specialists in directing participants to the appropriate available services which will assist participants in meeting their training, employment and career goals. The assessment/evaluation program will be responsive to requested changes from the County, and as well as have key staff available to participate in meetings with County staff. In summary, FACTS is **eager to continue this service in the County of Fresno, and is open to any changes or recommendations** that the County has to improve and implement the program.

The sequence of activities for Limited English Proficiency Assessments, Learning Disability Evaluations and Independent Assessments includes referral, scheduling, participant contact, orientation, assessment, analyzing of testing results, participant consultation for plan generation, assessment report with employment plan recommendations and implementation of quality control/review/statistical outcomes/feedback from both Job Specialists and participants.

FACTS also recognizes its responsibility to meets the challenges of CalWORKs WTW participants and problems associated with the service by doing the following:

- (a) The assessment and evaluation process must be conducted in an interactive and engaging manner. FACTS will conduct outreach that ensures that as high a percentage as possible of participants attend and complete the assessment process;
- (b) FACTS will be sensitive to literacy, language, and socio-cultural issues that may distort the quality of the assessment/evaluation process;
- (c) The assessment/evaluation process will be completed within five (5) working days from the time the CalWORKs WTW staff makes the initial referral for assessment, rather than the requested ten (10) business days listed in the RFP;
- (d) FACTS will be available for assistance to CalWORKs WTW staff address operational issues with County staff;

- (e) FACTS will gather feedback from both participants and Job Specialists on our process in order to ensure that the assessment/evaluation services are timely, respectful of the participant, and that the results are useful for both the Job Specialists and the participants in determining a reasonable WTW employment plan;
- (f) FACTS staff will deliver any training requested by the County of Fresno DSS;
- (g) FACTS will actively utilize the Quality Assurance Monitoring Process found in FACTS' Management and Quality Control Plan to ensure challenges and barriers encountered in the delivery of services will be resolved;
- (h) FACTS staff will attend quarterly quality assurance sessions at a company-wide level to provide the most up-to-date information concerning identification of service delivery issues and resolutions needed.

FACTS recognizes that CalWORKs participants referred for Limited English Proficiency (LEP), Learning Disabilities Evaluation (LDE) and Independent Assessments (IA) face challenges including:

- ✓ Missing important lessons usually learned at home or in school;
- ✓ Conflicting value systems and/or detrimental value systems;
- ✓ Lack of specific knowledge needed to make good decisions concerning money, jobs, housing, health, nutrition, and choices as they move towards self-sufficiency;
- ✓ Multiple barriers to employment, including family issues, such as child care and domestic abuse;
- ✓ Physical or behavioral health needs or intellectual disabilities;
- ✓ Learned avoidance of stressful situations (including assessment) resulting in increased no shows and lack of follow-through;
- ✓ Substance abuse problems;
- ✓ Legal issues;
- ✓ Transportation issues;
- ✓ Illiteracy;
- ✓ Anger management;
- ✓ Anxiety over testing;
- ✓ Lack of childcare, and
- ✓ Lack of understanding the vocational assessment process and purpose.

Even prior to the assessment/evaluation, FACTS addresses problems that may occur. FACTS attempts to minimize no show rates by providing the County of Fresno with brochures and handouts which are utilized as not only a "reminder appointment card" but a blurb encouraging the participant to attend (See Addendums 12-16, pages 254-260). The Job Specialist is able to provide this information to the participant upon scheduling the assessment. These brochures can be printed in English and Spanish and fully explain not only the date, time and address of the assessment, but also what the assessment measures, how the participant benefits from attending, and the overall goals of the program. Encouraging phrasing is utilized, with emphasis on positive results.

Further outreach to the scheduled participants takes place by sending a confirmation letter and making reminder phone calls regarding appointment dates. Additionally, the FACTS website ([www.FosterAssessment.com](http://www.FosterAssessment.com)) has maps, addresses, hours, contact phone numbers and accessibility information to assist participants with attendance. If a participant does not show up for their scheduled assessment, FACTS attempts to contact the participant and the Job Specialist to reschedule.

Upon commencement of the assessment, FACTS staff examines and addresses the above listed challenges, and individually addressed barriers, strengths and how both may impact career advancement. The assessor will conduct an orientation for participants before they begin the assessment describing the purpose of the assessment process. It will be emphasized to participants that the assessment process is designed to jointly determine viable employment goals. The participant plays an active role in identifying their interests, transferrable skills and job selections. The assessor outlines where the participant's interests and skill converge for the best chance at the ultimate goal of self-sufficiency and attaining long-term career advancement. Further, the orientation stresses the assessment should be considered a simulated work environment; therefore, work readiness issues are addressed and documented. Additionally, the participant is given general information on how to perform their best on testing and an attempt is made to alleviate tension some participants may experience prior to testing.

Additionally, a one-on-one background interview is conducted with each participant, at which time the personal data forms the participant has filled out upon entry are reviewed. The structured interview format is followed in which the assessor reviews not only the information provided by the participants, but also work history, employment goals, personal problems, physical abilities, vocational preferences, as well as enthusiasm and attitude towards work. Recognizing the special needs of these participants is key, as the interview process and employment barrier discussions are conducted at this stage to assist participants requiring supportive services in terms of physical or mental handicaps, chemical dependency, non-English or limited English proficiency, learning disabilities, domestic violence, and other employment barriers that may exist and/or that may have been previously discussed or identified within the intake process.

With regard to chemical dependency, mental handicaps and legal issues that have negatively affected employment, assessors are trained to assist in identification of employment options that work within barriers until they are eliminated. Gaps frequently occur when incarceration, termination without warning, or dependency issues arise. In addition to our one-on-one vocational interview, assessors look for length of employment on the job so as to discern between moving up a career ladder and leaving due to employment difficulties, skill inabilities or terminations. Quarterly training of assessors takes place at a company-wide level to provide the most up-to-date information concerning identification of such issues, and how to address them within the context of career direction and selection.

Upon completion of the assessment FACTS ensures quality follow-up with each individual assessment report and, therefore, management issues by several methodologies, including:

- ✓ Prior to report submission performance is monitored on numerous levels, including initial assessor test results, review by the Assessor, oversights by the Director of Services, data entry into FACTSTRACK by clerical staff, and final report submission and review by the principal Vocational Assessor, all components are checked at many levels prior to report documentation;
- ✓ free follow-up retesting for any participant (within a twelve month period of the assessment) is provided whenever a Job Specialist, or participant requests such;
- ✓ report addendums and modifications are available through discussion with the Job Specialists when the need arises;
- ✓ Job Specialists can send participants back to the assessment staff for free follow-up testing to measure the effectiveness of basic skills remediation (reading, or math testing) or

- vocational training (typing, software knowledge [Windows, Word, Excel, Outlook E-mail]) within twelve months of assessment;
- ✓ a feedback form provided to each participant, as well as to each Job Specialist. Feedback received is sent to the Director of Services at the administrative office, who follow-ups on any unsatisfactory results; and
  - ✓ a written grievance and complaint process is in place, and each participant is made aware of the availability of the form during the orientation process. Any complaints are sent directly to the Director of Services at the administrative office. Response will generally be made within two days and the Director of Services will make any change of service necessary regarding resolution of any complaint received. Grievances have been rare, and they are viewed as a valuable tool to providing excellent service.

Regarding management of numerous referred participants, FACTS conducts the assessment in a manner that attempts to complete as many assessments as possible that are referred by the CalWORKs WTW staff. FACTS realizes that once a participant requests services, it is imperative to commence the assessment as soon as possible. The previously identified barriers sometimes limit attendance at the assessment, and it is important to commence the assessment quickly. Our process is not only effective in quantity, provided quickly, but is sensitive to literacy, language, and socio-cultural issues that have the potential to distort the quality of the assessment process. These procedures are laid out in the company's Director's Log, Reference Books, the Fresno County CalWORKs Assessment Handbook and Administrative Handbooks. These handbooks specify processes and guidelines for our FACTS staff to follow.

Each Assessor is fully trained on topics that relate to effectively dealing with sensitivity of client issues. Each client participates in a one on one interview in a private office, and is encouraged to introduce any issues that may negatively impact their successful transition to work. Assessors are trained on how to positively encourage forthrightness in the conversation, addressing the positive aspects of how to overcome the barriers rather than ignore them. Assessors are trained on listening skills, hearing not only participant words, but requests and problems underlying the issues. Assessors know precisely when to contact the referring source if issues require immediate attention, such as suicidal intentions or child abuse or domestic violence issues. Assessors are not only trained to gather information in a sensitive environment, but to give feedback in a manner which positively encourages growth or movement towards the identified goal. Test results are structured to identify barriers, and outline actions needed to manage or remove the barrier. One of the strongest tools we can point to that shows our sensitivity to participants is the Fresno County CalWORKs Participant Satisfaction Feedback Summary (Addendum 10, page 236) in which participants actually grade FACTS' Assessors on their ability to be sensitive to their issues.

FACTS has been collecting such feedback data for many years on an ongoing basis, since the inception of the contract in 2016 for the County of Fresno and focuses training around the recommendations of participants and Job Specialists. Almost all clients and participants that have participated in FACTS assessments have given excellent scores to the Assessors for the manner in which they were treated.

FACTS staff has been trained to be sensitive to family issues and we have customized our services to be family-centered and family friendly. FACTS offers extended hours for the assessment services and, when deemed appropriate by the Job Specialist, have allowed our assessment center to be available to participants during non-traditional hours (evenings and weekends).

A focus during the interaction between the Assessor and the participant is to motivate and enable the participant to see themselves as having employment potential and critical importance to their family members. FACTS attempts to make the assessment process a positive experience for the participant. FACTS Assessors make sure the participants are agreeing to employment goals via an informed choice by providing them employment background data on selected employment goals in a written form, which can be shared with family members. This employment data covers working conditions, salary levels, and employment outlook for the job recommendation.

**b.** *Descriptions of any similar or related contracts under which the bidder has provided services.*

At present, FACTS provides CalWORKs WTW vocational assessments and learning disability evaluations in eight counties within California, including the County of Fresno. Limited English Proficiency, Learning Disabilities Evaluation and Independent Assessments are a specialty of the company, as we are the largest vocational assessment and learning disability provider in the state of California for CalWORKs, and are the current provider for the County of Fresno. These assessment services have been continuously provided for the past 38 years, and in that timeframe, we have serviced over 250,000 CalWORKs WTW participants. Please see the following chart listing a description of similar or related contracts. It is important to note that FACTS has never been dropped as a provider in its 38 year history due to a lack of satisfactory performance. Additionally, FACTS continued providing services during COVID-19 pandemic with no lapse of services for participants or County contract and program staff.

**CURRENT LIST OF CalWORKs WTW and SIMILAR CONTRACTS**

<b>Duration of Contract</b>	<b>Type of Service</b>	<b>Location of Area Served</b>	<b>Agency - Name/Address</b>
<b>CalWORKs &amp; TANF CONTRACTS</b>			
2016 to Present	CalWORKs WTW Limited English Proficiency (LEP) Vocational Assessment, Learning Disability Evaluations & Independent Assessments	All of Fresno County \$280,175 annual	County of Fresno Department of Social Services (DSS) 205 W. Pontiac Way, Bldg. 2 Clovis, CA 93612 Leah Melidonian, Senior Staff Analyst (559) 600-3061 <a href="mailto:lmelidonian@fresnocountyca.gov">lmelidonian@fresnocountyca.gov</a>
1989 to Present	CalWORKs WTW Vocational Assessment, Learning Disability Evaluations & Independent (Third Party) Assessments	<i>L.A. County Areas:</i> Antelope Valley, San Fernando Valley, City of Los Angeles, South L.A. County, Long Beach \$1,700,000 approximate	County of Los Angeles Department of Public Social Services Los Angeles County of Education (LACOE) 9525 Imperial Highway, Downey, CA 90242 Onica Ross, Program Manager (562) 922-8620 <a href="mailto:Ross_Onica@lacoedu">Ross Onica@lacoedu</a>
1998 to Present	CalWORKs WTW Vocational Assessment & Learning Disability Evaluations	All of Orange County \$599,000 annual	County of Orange Social Services Agency 500 N. State College Bl., Suite #100, Orange, CA 92868 Thu Phan, Contract Administrator (714) 541-7796 Cell (714) 277-5000 <a href="mailto:Thu.Phan@ssa.oc.gov.com">Thu.Phan@ssa.oc.gov.com</a>
1995 to Present	CalWORKs WTW Vocational Assessment & Learning Disability Evaluations	All of Kern County \$575,000 annual	County of Kern Department of Human Resources P.O. Box 511 100 E. California Ave., Bakersfield, CA 93302 Elizabeth Rose, Assistant Program Director (661) 633-7298 Cell (661) 428-5060 <a href="mailto:Rosee@kerndhs.com">Rosee@kerndhs.com</a>

*\*Important to note that FACTS has never been dropped as a provider in its 38 year history due to a lack of satisfactory performance.*

**CURRENT LIST OF CalWORKs WTW and SIMILAR CONTRACTS**

<b>Duration of Contract</b>	<b>Type of Service</b>	<b>Location of Area Served</b>	<b>Agency - Name/Address</b>
<b>CalWORKs &amp; TANF CONTRACTS</b>			
2015 to Present	CalWORKs WTW Learning Disability Evaluations	All of Riverside County \$203,304 annual	County of Riverside Department of Public Social Services 4060 County Circle Drive Riverside, CA 92503 Lee Lor, Program Specialist II (951) 358-3920 micro 83920 <a href="mailto:Blor@rivco.org">Blor@rivco.org</a>
1999 to Present	CalWORKs WTW Learning Disability Evaluations	All of San Bernardino County \$50,000 annual	County of San Bernardino Human Services Agency 150 S. Lena Road, San Bernardino, CA 92415 John Greswit, Contract Analyst (909) 388-0255 <a href="mailto:John.Greswit@hss.sbcounty.gov">John.Greswit@hss.sbcounty.gov</a>
2002 to Present	CalWORKs WTW Learning Disability Evaluations	All of Ventura County \$25,000 annual	County of Ventura Human Services Agency 855 Partridge Drive, Ventura, CA 93003 Cynthia Alonzo-Werts, Program Analyst (805) 477-5356 <a href="mailto:Cynthia.Alonzo@ventura.org">Cynthia.Alonzo@ventura.org</a>

*\*Important to note that FACTS has never been dropped as a provider in its 38 year history due to a lack of satisfactory performance.*

**CURRENT LIST OF SIMILAR CONTRACTS**

<b>Duration of Contract</b>	<b>Type of Service</b>	<b>Location of Area Served</b>	<b>Agency - Name/Address</b>
<b>GENERAL RELIEF</b>			
1998 to Present	GROW (General Relief) Vocational Assessment	Northridge, Long Beach Los Angeles, Palmdale	County of Los Angeles Department of Public Social Services Los Angeles County of Education (LACOE) 9525 Imperial Highway, Downey, CA 90242 Onica Ross, Program Manager (562) 922-8620 <a href="mailto:Ross_Onica@lacoed.edu">Ross_Onica@lacoed.edu</a>
<b>WORKFORCE DEVELOPMENT BOARD</b>			
1994 to Present	WIOA Vocational Assessment	Anaheim	City of Anaheim Community & Economic Development Dept. Workforce Development Division 201 S. Anaheim Blvd. #1001 Anaheim, CA 92805 Julie Sedlacek, Management Assistant (714) 765-4354 <a href="mailto:jsedlacek@anaheim.net">jsedlacek@anaheim.net</a>
<b>CALIFORNIA DEPARTMENT OF REHABILITATION</b>			
1993 to Present	Vocational Assessments	Los Angeles, Kern, Orange, Fresno, and Ventura Counties	State of California - Department of Rehabilitation 15400 Sherman Way, Suite 140 Van Nuys, CA 91406 Christine Coswatte, Resource Specialist (818) 901-5073, Cell (818) 307-0397 <a href="mailto:christine.coswatte@dor.ca.gov">christine.coswatte@dor.ca.gov</a>
<b>U.S. DEPARTMENT OF LABOR</b>			
2001 to Present	Vocational Assessments	Los Angeles, Orange, Fresno, Ventura and Kern Counties	U.S. Department of Labor (OWCP/DEEOIC) 1240 East Ninth Street, Room 851 Cleveland, Ohio 44199 Gail Schott, Rehabilitation Specialist (216) 802-1300 <a href="mailto:Schott.Gail@dol.gov">Schott.Gail@dol.gov</a>

**c.** *Descriptions of the qualifications of the individual(s) providing the services.*

Foster Assessment Center & Testing Service, Inc.'s (FACTS) minimum qualifications to serve as an Assessor include a four-year college degree as well as 15 college hours in career counseling related coursework as well as three hours specifically in career counseling/guidance. However, for this contract, staff exceeds a Bachelor's degree, as the Director/Assessor has obtained a Master's degree in Human Behavior Psychology. FACTS assessors must be either fully bilingual in Spanish/English with a B.A. or B.S. in counseling or a psychology-related field, or must have a Master's Degree generally in Counseling or a psychology-related field. Further, they take any additional college coursework necessary to prepare them to become qualified as a Certified Vocational Evaluation Specialist (C.V.E.) and/or International Psychometric Evaluation Certification (I.P.E.C.).

The FACTS Assessors conducting CalWORKs assessments significantly exceed the minimum education requirements indicated in this RFP. Additionally, they each have a wealth of experience providing CalWORKs assessments during the previous three-year contract with the County of Fresno, are fully bilingual in Spanish. Knowledge of and interpretation of an extensive inventory of over 150 English and Spanish tests are well developed skills of our Assessors. Objective assessment is the foundation of our company, and our Assessors are trained extensively in this highly specialized field.

FACTS learning disabilities evaluators conducting LD evaluations exceeds the mandated qualifications of this RFP, as they possess the following minimum qualifications:

1. Graduation from an accredited college or university with MA or MS Degree, with coursework that included at least fifteen (15) semester units in the area of career planning, guidance principles and techniques, personality development, occupational and industrial information, tests and measurements, or other coursework relating to counseling preparation; or Graduation from an accredited college or university with a MA or MS Degree, with at least two (2) years of counseling experience. At least fifty (50%) percent of such experience consists of vocational counseling in a variety of occupational fields.
2. Experience in working with adults, especially those with barriers to employment.
3. Qualified to conduct tests to identify learning disabilities and determine appropriate accommodations for individuals with learning disabilities.
4. An understanding of the CalWORKs program, its goals, services, and operation.
5. Knowledge of the local labor market.
6. Knowledge of the availability of local educational, training and learning disability resources.

**Certified Vocational Evaluation Specialist (C.V.E.) and International Certified Vocational Evaluation Specialist (I.C.V.E.)** are the **highest nationally recognized level of assessment/evaluation certification** administered by Commission on Rehabilitation and Counselor Certification and the College of Vocational Rehabilitation Specialists Board. The CVE/ICVE certification requires:

- passing of a comprehension examination on the field of vocational evaluation;
- two to four years work experience in the field of evaluation;
- specific college coursework in career counseling and testing;
- BA or MA in a counseling-related field;
- review of work product; and
- continuing educational units to maintain certification.

FACTS has more C.V.E.s and ICVE's than any agency in California. All other newer Evaluators/Assessors are completing the four years of work experience required prior to eligibility for certification.

A registration was initiated (2013) for **Professional Vocational Evaluator (P.V.E.)** status. Numerous FACTS staff members have already reached this status. The P.V.E. requires:

- two to four years work experience in the field of evaluation;
- specific college coursework in career counseling and testing;
- BA or MA in a counseling-related field;
- review of work product; and
- continuing educational units to maintain certification.

Lastly, a certification for evaluators, **International Psychometric Evaluation Certification (I.P.E.C.)** was opened (2015) and most Evaluators have already reached that status and been awarded the certification. The I.P.E.C. requires:

- two to four years work experience in the field of evaluation;
- specific college coursework in career counseling and testing;
- MA in a counseling-related field;
- review of work product; and
- continuing educational units to maintain certification.

FACTS plans to encourage achieving and maintaining C.V.E., I.C.V.E., and I.P.E.C. status with all eligible Evaluators/Assessors within the company.

Our recruitment and interview process for new Assessor applicants is exhaustive, including a four level screening review. Applicants are screened out at each level, until we narrow the potential employee to the final stage. FACTS has an extensive hiring methodology that has been improved upon over our 35-year existence. Specific hiring levels are as follows: (1) Review of resumes, applications, education and transcripts from outreach within the internet, colleges, word of mouth, references from existing staff and professional interchange at conferences and other professional gatherings; (2) Three hours of individual testing in the areas of reading, vocabulary, general learning ability, cognitive processing, attention to detail, mathematical comprehension (to ensure correlative test interpretation) and writing style; (3) An additional two hours of testing including personality, ethics, sensitivity to cultural differences and a personal one-on-one interview. References are contacted. (4) Second stage personal interviews occur, with final recommendations made to the administrative office for reference checks. (5) Provisional hiring takes place after administrative approval/interviewing and background checks are scheduled.

For a more detailed description of employees that will provide services for the proposed Assessment Services component, please see Addendum 4, Resumes page 150.

**Andrea Foster, M.A., C.V.E., I.C.V.E., P.V.E., I.P.E.C., A.B.V.E.,** Founder and CEO, has a Master's Degree in Counseling Focused Human Resource Management and has over 38 years of experience as a Vocational Assessor/Evaluator, is nationally certified as a Certified Vocational Evaluator (C.V.E.), International Certified Vocational Evaluator (I.C.V.E.), Professional Vocational Evaluator (P.V.E), is a Diplomate with the American Board of Vocational Experts (A.B.V.E.) and is certified in International Psychometric Evaluation (I.P.E.C.). Her specific degree emphasizes

managing an individual's resources/skills within an assessment and evaluation situation. She has conducted tens of thousands of vocational assessments and learning disability evaluations. As **Director of Services and Project Manager**, she oversees the hiring and training of new personnel, as well as performance reviews and examines new test instruments for updates to FACTS' testing instruments inventory. See attached resume.

**Katie Foster, M.A.**, has a Master of Arts in Psychology with an emphasis in Career Management and Counseling from University of the Rockies. She has over fifteen years of experience as a Vocational Assessor, Learning Disability Evaluator, **Staff Development Specialist**, and **Chief Operating Officer** with FACTS. Katie has been involved with the implementation of this contract since its inception in 2016, has attended every DSS quarterly meeting, and sends monthly MAR reports and invoicing to the County. As COO, she handles staff quality assurance monitoring, reviews assessment and work evaluation reports, manages corporate compliance issues and oversees contract implementation. Katie is also responsible for coordinating, implementing and presenting at quarterly Evaluator and Technician staff trainings. She has worked with hundreds of CalWORKs participants in Ventura, Riverside and Los Angeles Counties. Katie trained for learning disability evaluations (Woodcock-Johnson IV cognitive tests and academic tests) under the direction of noted LD Evaluation Licensed Educational Psychologist, Dr. Michael Haas. See attached resume.

**Esmeralda Apresa, M.A.**, Human Behavior Psychology from National University is the **Director of FACTS Fresno** center. She initially served in the role of Secretary and Vocational Technician when FACTS first opened our center in Fresno in 2016. She has chosen to continue her education in the field of psychology in order to best understand and assist CalWORKs participants as well as the FACTS professional evaluation staff in their duties, first obtaining her B.A. (Psychology) in 2020, and progressing to her M.A. in 2022. She is fully bilingual (English/Spanish). She has conducted hundreds of Learning Disability Evaluations and Limited English Proficiency Assessments for the County of Fresno. Esmeralda additionally has conducted multiple trainings for Fresno DSS staff, job specialists and DSS WTW Job Readiness program (JobWISE). See attached resume.

**Silvia Lopez, B.A.**, has a Bachelor of Arts degree in Sociology from California State University Fresno (2020) is a **Vocational Assessor** at the FACTS Fresno center. She is bilingual in English and Spanish, and has been employed with FACTS since July 2022. As a Vocational Assessor she has conducted numerous Limited English Proficiency assessments for the County of Fresno CalWORKs WTW program. Silvia has conducted training for Fresno DSS staff and job specialists, and assists in performing LEP assessments both in Fresno and the district offices in Reedley and Selma.

**George North, M.S., C.R.C., P.V.E., I.P.E.C.** has a Master of Science in Counseling from California State University Los Angeles. He is a Certified Rehabilitation Counselor (C.R.C.), Professional Vocational Evaluator (P.V.E.) and is certified in International Psychometric Evaluation (I.P.E.C.). He has been employed with FACTS since 2006. He has conducted over 600 Learning Disability Evaluations for the County of Riverside and 15,000 Vocational Assessments for the Los Angeles County GAIN/CalWORKs program. George trained for learning disability evaluations (Woodcock-Johnson IV cognitive tests and academic tests) under the direction of noted LD Evaluation Licensed Educational Psychologist, Dr. Michael Haas. George is available as a backup **Vocational Assessor and Learning Disability Evaluator**. See attached resume.

**Manuel Zaragoza, B.S.**, has a Bachelor of Science degree in Psychology from Notre Dame de Namur University. Manuel is the Director of FACTS Bakersfield Center. He is in his first year with

FACTS, and has attended extensive training on vocational assessments, learning disability evaluations and limited English Proficiency evaluations. Manuel is available as a backup **Vocational Assessor**. See attached resume.

**Craig Houston, M.S., I.P.E.C.**, has a Master of Science in Career Counseling from California State University Northridge. He has been employed with the company since 2008 and is certified in International Psychometric Evaluation (I.P.E.C.). He is the Director of FACTS Palmdale Center and travels frequently to Kern district offices to conduct CalWORKs assessments. He has conducted over 2,500 Vocational assessments and over 500 Learning Disability Evaluations for the Los Angeles County GAIN/CalWORKs program. Craig trained for learning disability evaluations (Woodcock-Johnson IV cognitive tests and academic tests) under the direction of noted LD Evaluation Licensed Educational Psychologist, Dr. Michael Haas. Craig is available as a backup **Vocational Assessor and Learning Disability Evaluator**. See attached resume.

**Cathy Stott, M.S., C.V.E., P.V.E., I.P.E.C.**, has a Master's degree in Vocational Rehabilitation Counseling from the University of Wisconsin Stout. She is a nationally certified as a Certified Vocational Evaluator (C.V.E.), Professional Vocational Evaluator (P.V.E.) and is certified in International Psychometric Evaluation (I.P.E.C.). She has more than 25 years of experience as a Vocational Evaluator. As FACTS' **Education/Training Consultant**, she works with FACTS management to ensure that all new Evaluators complete educational requirements for career counseling coursework and educational requirements toward obtaining/monitoring their Certified Vocational Evaluation, and/or Professional Vocational Evaluator (P.V.E.) status. She has provided numerous nationally certified seminars for staff development. As FACTS' **Research Consultant**, she is an accepted author for assessment and career guidance publications. Ms. Stott currently provides research and analysis of FACTS' annual participant and counselor feedback surveys and annually updates the noted FACTS' Job Demand Lists by County.

**d.** *Any material (including letters of support or endorsement) indicative of the bidder's capability.*

FACTS has numerous letters of support from agencies we have worked with in the past. We have a long-standing relationship with many agencies affiliated with CalWORKs, and encourage the County of Fresno to contact any agency with have worked with and/or currently work on any of our contracts. As noted, FACTS has never had a contract terminated prior to completion. FACTS has worked hard to maintain our relationship with these agencies through dedicated work, excellence of service, and attentiveness to the County's needs. Secondly, regarding our services, FACTS is proud of our relationship and accreditation through the Commission on Accreditation of Rehabilitation Facilities (CARF). CARF is an internationally recognized certification, which ensures each FACTS facility has ample diagnostic testing and assessment equipment, ample testing space, trained assessment staff, meets all ADA guidelines, and has professional assessment procedures in place.

FACTS maintains a management strategy that ensures a high level of customer satisfaction as it has all its centers accredited and directed by CARF Accreditation Standards. Specifically, CARF promotes organizational quality by reviewing a company's policies, directives and results in the following areas:

- A. Policy on Input from the Person Served;
- B. Organization's Policy on Accessibility;
- C. Standards Supporting Organization's Policy on Outcomes;

- D. Organization's Policy on Rights, Health, and Safety;
- E. Organization's Policy on Human Resource Development;
- F. Standards Supporting the Organization's Policy on Leadership;
- G. Organization's Policy on Legal Requirements; and
- H. Standards supporting the Organization's Policy on Financial Planning and Management.

FACTS' policy statement on each of the above noted directives are available for review by any agency contracting with, or referring clients to FACTS.

We have included past letters of recommendation in this section of this RFP, however, have also included our entire CARF Survey Report as (Addendum 9, page 218), and encourage the County of Fresno to scrutinize this document. Each accreditation takes months of preparation, and lays out standards to follow for years to come. FACTS carefully maintains these standards at all our facilities including our FACTS Fresno center.



## Los Angeles County Office of Education

Serving Students • Supporting Communities • Leading Educators

September 9, 2022

Debra Duardo, M.S.W., Ed.D.  
Superintendent

Los Angeles County  
Board of Education

Betty Forrester  
President

James Cross  
Vice President

Judy Abdo

Yvonne Chan

R. Michael Dutton

Stanley L. Johnson, Jr.

Monte E. Perez

To Whom It May Concern:

I am pleased to provide you with this letter of reference for Foster Assessment Center & Testing Service, Inc. (FACTS). FACTS has contracted with the Los Angeles County Office of Education (LACOE) for over twenty years to provide vocational assessments and learning disability evaluations.

Through their multiple contracts with LACOE, FACTS has provided services for the CalWORKs, General Relief, and Refugee populations. In addition to the vocational assessment and learning disability evaluation services they have provided, FACTS evaluators have also conducted "Barriers to Employment" screenings for mental health issues, substance abuse and domestic violence.

FACTS is currently in good standing with LACOE and in compliance with all aspects of their contract. When issues arise, such as changes to procedures of policy, FACTS management has responded quickly and provided thorough training for their staff.

If you need any further information regarding FACTS and their contracts with LACOE, please feel free to contact me using the information provided below.

Regards,

Ana M. Lopez, M.S.  
Vocational Assessment Monitor  
Los Angeles County Office of Education  
Tel: (562) 355-1192  
Email: [lopez\\_ana@lacoed.edu](mailto:lopez_ana@lacoed.edu)



**County of Orange**  
**SOCIAL SERVICES AGENCY**

500 N. STATE COLLEGE BLVD.  
ORANGE, CA 92868-1673  
(714) 541-7700

September 12, 2022

AN TRAN  
DIRECTOR

VACANT  
CHIEF DEPUTY DIRECTOR

DORCHELLE  
DIVISION DIRECTOR  
ADMINISTRATIVE SERVICES

JYOTHI AILURI  
DIVISION DIRECTOR  
ASSISTANCE PROGRAMS

CHRISTINE SNAPPER  
DIVISION DIRECTOR  
CHILDREN & FAMILY SERVICES

GAIL ARAUJO  
DIVISION DIRECTOR  
FAMILY SELF-SUFFICIENCY &  
ADULT SERVICES

VACANT  
MEDICAL DIRECTOR

RE: Letter of Reference for Foster Assessment Center & Testing Service, Inc

To Whom It May Concern:

This letter is in response to a recent request for a reference for Foster Assessment Center & Testing Service Inc (FACTS).

The County of Orange Social Services Agency (SSA) has contracted with FACTS for the provision of Vocational Assessment Services and Learning Disability Evaluations to CalWORKs participants since December 2002. The current contract is effective July 1, 2020, through June 30, 2023, with a maximum obligation of \$599,000, for the current Fiscal Year. FACTS is meeting their contractual obligations with the County of Orange.

Please do not hesitate to contact me at [An.Tran@ssa.ocgov.com](mailto:An.Tran@ssa.ocgov.com) or call (714) 541 7773 with any questions

Sincerely,

An Tran  
SSA Director

cc Gail Araujo, Division Director, Family Self-Sufficiency & Adult Services  
Loan English, Deputy Division Director, Family Self-Sufficiency & Adult Services  
Sumit Supra, Deputy Division Director, Family Self-Sufficiency & Adult Services

File



# Department of Public Social Services

Sarah Mack, Interim Director

**REFER REPLY TO:**

- 63 S. Fourth Street  
Benning, CA. 92220
- 901 East Ramsey St  
Benning, CA. 92220
- 1225 West Hobson Way  
Blythe, CA. 92225
- 1267 West Hobson Way  
Blythe, CA. 92225
- 68-615 Perez Rd. Unit 9A  
Cathedral City, CA. 92234
- 68-825 Perez Rd. Ste. 4 & 5  
Cathedral City, CA. 92234
- 505 S. Buena Vista  
Corona, CA. 92882
- P.O. Box 79110  
Corona, CA. 92877-0170
- 14-201 Palm Dr. Ste. 110  
Desert Hot Springs, CA. 92240
- 541 N. San Jacinto St.  
Hemet, CA. 92543
- 547 N. San Jacinto Ave.  
Hemet, CA. 92543
- 561 N. San Jacinto St.  
Hemet, CA. 92543
- 44199 Monroe Street Ste. D  
Indio, CA. 92201
- 48-113 Jackson St.  
Indio, CA. 92201
- 333 Limited Ave.  
Lake Elsinore, CA. 92530
- 1400 Minthorn St.  
Lake Elsinore, CA. 92530
- Staff Development Training Ctr.  
22690 Cactus Ave. Ste. 100  
Moreno Valley, CA. 92553
- OPSS Medi-Cal Unit  
RCMRC - Area D  
26520 Cactus Avenue  
Moreno Valley, CA. 92555
- 23119 Cottonwood Ave. Bldg. B & C  
Moreno Valley, CA. 92553
- 517 W. Parkridge Ave.  
Norco, CA. 92860
- 351 Wilkerson Ave. Ste. D  
Perris, CA. 92570
- 2095 N. Perris Blvd. Ste. B  
Perris, CA. 92571
- 201 Redlands Ave.  
Perris, CA. 92571
- 3610 Central Ave.  
Riverside, CA. 92506
- Administrative Office  
4060 County Circle Drive  
Riverside, CA. 92503
- 10769 Hole Avenue, Ste. 110  
Riverside, CA. 92503
- 10281 Kidd Street  
Riverside, CA. 92503
- 11060 Magnolia Ave.  
Riverside, CA. 92505
- 11070 Magnolia Ave.  
Riverside, CA. 92505
- 2300 Market St.  
Riverside, CA. 92501
- 5901 Mission Blvd. Ste. 100  
Riverside, CA. 92509
- 7888 Mission Grove Pkwy, Ste. 120  
Riverside, CA. 92508
- 7894 Mission Grove Pkwy, Ste. 100  
and Ste. 150  
Riverside, CA. 92508
- 731 Palmyra Ave.  
Riverside, CA. 92507
- 3950 Reynolds Rd.  
Riverside, CA. 92503
- Eligibility Administrative Services  
7894 Mission Grove Pkwy St.  
Ste. 100, Riverside, CA. 92508
- 43264 Business Park Dr.  
Building B, Ste. 1  
Temecula, CA. 92590
- 27404 Commerce Center Dr. #E  
Temecula, CA. 92590

January 29, 2019

Andrea Foster, Chief Executive Officer  
Foster Assessment Center and Testing Service Inc.  
516 Pennsfield Suite 108  
Thousand Oaks, CA 91360

RE: Monitoring of Contract CW-03174  
Contract / Review Period: July 1, 2017 through June 30, 2018  
Maximum Amount: \$232,338.00 (FY 17/18)  
Type of Service: Learning Disability Evaluation and Diagnosis Services

Dear Mrs. Foster:

At this time I would like to take this opportunity to thank you for completing the desktop monitoring of the above referenced contract.

On December 4, 2018, representatives of the Department of Public Social Services (DPSS) conducted a desktop monitoring of the agreement listed above. The purpose of the Monitoring Review was to partner with you to ensure compliance with contract requirements and to verify that all deliverables mandated under these agreements are being carried out in an efficient and timely manner.

This Monitoring Review resulted in zero (0) recommendations or requests for corrective action.

Please review the attached report, and provide any response within thirty (30) days of receipt of this report. Should you have any questions regarding this correspondence, I can be reached at 951-509-8064.

Once again, thank you for your assistance.

Sincerely,

James C. Moore III  
Contracts and Grants Analyst  
Contracts Administration Unit

Enclosures



## Transitional Assistance Department

**Gilbert Ramos**  
Director

**James LoCurto**  
Assistant Director

January 29, 2018

To Whom It May Concern:

I am writing this letter of recommendation for Foster Assessment Center & Testing Service, Inc. (FACTS).

FACTS is currently a contracted provider with the Transitional Assistance Department (TAD), and provides Learning Disability Evaluations for Welfare-to-Work customers throughout San Bernardino County. FACTS is a long-standing provider of services, working with San Bernardino County since 2005.

FACTS has fulfilled all contractual obligations and has been of great assistance in all aspects of the provision of learning disability evaluation services to CalWORKs participants. Their knowledge of testing and evaluation is current, and their staff is well qualified. They have been instrumental in providing training within our County, and have facilitated policy changes as per our request with efficiency. They demonstrate a professional working relationship with TAD staff, and we consider them a valuable resource in serving our customers.

Sincerely,

A handwritten signature in blue ink, appearing to read "Gilbert Ramos".

Gilbert Ramos, Director  
Transitional Assistance Department

### BOARD OF SUPERVISORS

**ROBERT A. LOVINGOOD**  
Chairman, First District

**JANICE RUTHERFORD**  
Second District

**JAMES RAMOS**  
Third District

**CURT HAGMAN**  
Vice Chairman, Fourth District

**JOSIE GONZALES**  
Fifth District

**CHRIS BROWN**  
Sixth District



**Duffy Kruspodin, LLP**  
Certified Public Accountants

Los Angeles

21600 Oxnard St.  
Suite 2000  
Woodland Hills, CA 91367  
tel (818) 385-0585  
fax (818) 436-7588

9171 Wilshire Blvd.  
Suite 650  
Beverly Hills, CA 90210  
tel (310) 274-9922  
fax (310) 858-1640

San Diego

4225 Executive Square  
Suite 900  
La Jolla, CA 92037  
tel (858) 642-5050  
fax (858) 642-5065

4304 Park Blvd.  
San Diego, CA 92103  
tel (619) 295-2637  
fax (619) 299-5549

www.dkllpcpa.com

Member

American Institute of  
Certified Public Accountants



California Society of  
Certified Public Accountants



www.jhi.com  
Associated Worldwide with JHI

April 20, 2021

To Whom It May Concern:

Foster Assessment Center and Testing Services, Inc. (FACTS), is a private for-profit S Corporation that utilizes State of the Art's MAS90 Computerized accounting programs in-house to perform their bookkeeping functions on the accrual basis accounting. Their in-house computerized accounting programs includes accounts receivable, accounts payable, payroll, general ledger and fixed assets. The internal accounting functions are performed daily by the accounting staff and reviewed by the company controller on a weekly basis. Month-end accounting and reconciliations are performed through the computerized accounting system by the controller and separate accounts are kept for each funding source.

At the end of the quarter, the company controller analyzes the quarterly financial statements and reconciles the balance sheet accounts to the underlying records and performs an analytical review of all the profits and loss accounts. Upon completion of the controller's quarterly review of the financial statements and reconciliation, either I or Tom Duffy, or one of our staff members review the financial statements and meet with the Company Controller, Mike Langdon, the Company Owners and the Facts Board of Directors to review our findings. Our analysis of the company financial statements is performed in the Woodland Hills administrative office.

At the end of the calendar year, I personally review the financial statement accounts and reconcile to the underlying supporting documents before the year-end closing.

If there are any questions or concerns regarding the accounting practices or policies at Foster Assessment Center, please feel free to contact me at my office.

Sincerely,

Donna M. Feder, CPA

R:\data\21\clients\fo\31\Letter from D Feder to REP's dtd 04.20.21.docx



**Amy Koellner**  
MS, ABVE, CRC, LPCC-LPC 1684  
a.koellner@ccnccservices.com  
4647 Long Beach Blvd., Ste. D10, Long Beach, CA 90805-6976  
Tel: 562.490.9523 Fax: 562.490.3814

September 7, 2022

To Whom it May Concern:

I am pleased to write this letter of recommendation for Foster Assessment Center & Testing Service, Inc. (FACTS)

I have conducted business with FACTS for over three decades and have referred numerous clients for assessment and evaluation services.

My referrals encompass a number of different types of clients, and FACTS has been very helpful in documenting not only the specific skill levels my clients demonstrate, but also in identifying potential barriers and strengths that may impact their successful return to employment. Reports are generated in a timely fashion and contain pertinent answers to referral questions I pose. My clients may have physical injuries, head traumas, learning disabilities, mental diagnoses, legal convictions, etc., and or combination of all

FACTS evaluators are experts in their field, and regularly attend conferences, collaborative meetings and maintain up-to-date certification and accreditations. It is with pleasure I recommend their services and am available for a phone call if that would be of assistance

Sincerely,

Amy Koellner MS  
National Certified Rehabilitation Counselor  
CA Licensed Professional Clinical Counselor  
Diplomate American Board of Vocational Experts  
AK: bl



Tina Hovery  
Case Manager  
Email: [tina@hearingrepresentative.com](mailto:tina@hearingrepresentative.com)

Philip S. Lewis, Ph.D., J.D.  
Hearing Representative  
Email: [Philip@hearingrepresentative.com](mailto:Philip@hearingrepresentative.com)

September 6, 2022

**Recommendation for Foster Assessment Center**

To Whom it May Concern:

It is with great pleasure that I recommend Foster Assessment Center & Testing Service, Inc. (FACTS).

I have done business with FACTS for over 30 years, and have referred numerous clients for assessment and evaluation services. Their attention to detail regarding specific referral criteria, evaluation results and knowledge of testing is excellent. They demonstrate expertise with numerous types of individuals I have referred over the years, including those that have suffered head traumas, back injuries, mental diagnoses, learning disabilities, intellectual disabilities, and more.

FACTS has demonstrated a history of successfully working not only within our community, collaborating with CalWORKs, Department of Rehabilitation, Department of Industrial Relations, insurance companies, but across Southern California in numerous counties, providing similar services.

I would strongly recommend their evaluation services for your CalWORKs participants, and welcome your phone contact if more information is needed.

Respectfully,  
ADVOCACY

*Philip S. Lewis*

Philip S. Lewis, Ph.D., J.D.  
Hearing Representative

[www.hearingrepresentative.com](http://www.hearingrepresentative.com)

1802 Eastman Avenue, Suite 102, Ventura, CA 93003  
Voice: (805) 642-6080 Fax: (805) 650-0797



Foster Assessment Center and Testing Service, Inc  
516 Pensfield Place suite 108  
Thousand Oaks, CA. 91360



Christine Coswatte  
Resource Specialist  
15400 Sherman Way  
Suite 140  
Van Nuys, Ca. 91406  
ccoswatt@dor.ca.gov  
818-901-5073 • Fax 818-901 5689

To Whom it May Concern:

September 7, 2022

This letter is to verify that Foster Assessment Center is approved as a current vendor of the Department of Rehabilitation. Foster Assessment Center provides Comprehensive Vocational Assessment Services for the Department of Rehabilitation on a fee for service basis.

Foster Assessment Center is currently accredited by The Commission on Accreditation of Rehabilitation Facilities (CARF) and are in compliance with The Department of Rehabilitation certification standards through November 30, 2022.

Sincerely

*Christine Coswatte*

Christine Coswatte  
Community Resource and Development Specialist  
Van Nuys/Foothill and Santa Barbara Districts  
[Christine.Coswatte@dor.ca.gov](mailto:Christine.Coswatte@dor.ca.gov)

CC Facility File



January 6, 2020

R. Craig Foster, CVE, PVE  
Foster Assessment Center & Testing Service, Inc.  
516 Pennsfield Place, Suite 108.  
Thousand Oaks, CA 91360

Dear Mr. Foster:

It is my pleasure to inform you that Foster Assessment Center & Testing Service, Inc. has been issued CARF accreditation based on its recent survey. The Three-Year Accreditation applies to the following program(s)/service(s):

**Comprehensive Vocational Evaluation Services**

This accreditation will extend through November 30, 2022. This achievement is an indication of your organization's dedication and commitment to improving the quality of the lives of the persons served. Services, personnel, and documentation clearly indicate an established pattern of conformance to standards.

The accreditation report is intended to support a continuation of the quality improvement of your organization's program(s)/service(s). It contains comments on your organization's strengths as well as any consultation and recommendations. A Quality Improvement Plan (QIP) demonstrating your organization's efforts to implement the survey recommendation(s) must be submitted within the next 90 days to retain accreditation. The QIP form is posted on Customer Connect ([customerconnect.carf.org](http://customerconnect.carf.org)), CARF's secure, dedicated website for accredited organizations and organizations seeking accreditation. Please log on to Customer Connect and follow the guidelines contained in the QIP form.

Your organization should take pride in achieving this high level of accreditation. CARF will recognize this accomplishment in its listing of organizations with accreditation and encourages your organization to make its accreditation known throughout the community. Communication of the accreditation to your referral and funding sources, the media, and local and federal government officials can promote and distinguish your organization. Enclosed are some materials that will help you publicize this achievement.

Your organization's complimentary accreditation certificate will be sent separately. You may use the enclosed form to order additional certificates.

If you have any questions regarding your organization's accreditation, you are encouraged to seek support from John Hannon by email at [jhannon@carf.org](mailto:jhannon@carf.org) or telephone at (888) 281-6531, extension 7198.

CARF International Headquarters  
6800 E. Southpoint Road  
Tucson, AZ 85706-0497, USA

[www.carf.org](http://www.carf.org)

January 6, 2020

CARF encourages your organization to continue fully and productively using the CARF standards as part of its ongoing commitment to accreditation. CARF commends your organization's commitment and consistent efforts to improve the quality of its program(s)/service(s) and looks forward to working with your organization in its ongoing pursuit of excellence.

Sincerely,

A handwritten signature in black ink, reading "Brian J. Boon, Ph.D." in a cursive script.

Brian J. Boon, Ph.D.  
President/CEO

Enclosures

e. *A brief description of the bidder's current operations, and ability to provide the services.*

Foster Assessment Center & Testing Service, Inc. (FACTS) is committed to enhancing the quality of life and independence of individuals in the local communities that we service through the provision and delivery of assessment and learning evaluation services. The goal of our company is to provide the finest professional limited English proficiency assessment and learning disability evaluation services for individuals in career transition or in need of vocational direction. Through the contribution of highly skilled staff, assessments and evaluations will identify individuals' vocational strengths and weaknesses and partner with individuals to establish strategies and steps leading to gainful employment.

Foster Assessment Center & Testing Service, Inc. (FACTS) was founded in 1984 and in 38+ years of continuous service has grown to be the largest vocational evaluation and assessment provider in California for the private sector, the California State Department of Rehabilitation, and U.S. Department of Labor. Vocational evaluations range from one day to ten days and focus not only on basic skills but also determine learning style, aptitudes, work skills, worker traits, physical tolerances and stamina and endurance. FACTS assessors are tremendously experienced in serving individuals with learning disabilities and/or physical handicaps.

FACTS is also the largest provider of assessment services for welfare recipients through the CalWORKs program in California. To date, FACTS has conducted over 250,000 vocational assessments and learning disability evaluations for the CalWORKs programs in Fresno, Los Angeles, Orange, San Bernardino, Kern, Riverside, and Ventura Counties. FACTS' assessors have also conducted thousands of vocational and career assessments for At-Risk Youth programs and for General Relief programs throughout Southern California. FACTS assessors also conduct vocational assessments at multiple career centers for a number of America's Job Centers.

Foster Assessment Center & Testing Service, Inc. (FACTS) is the current provider of these services for the County of Fresno, including all requested services in RFP 23-006 Welfare-To-Work Specialized Assessments. We are located in Fresno at 2350 West Shaw Avenue, Suite #118. FACTS Fresno evaluation center is the only vendorized assessment and evaluation center in the Fresno County that is CARF accredited, and, thus, is fully accessible to the handicapped population. Our center is spacious, fully stocked, and we are able to provide a seamless transition from the current contract to the requested contract without change of staff, change of facility, reporting mandates, services offered or upheaval in any scheduling of participants. As noted, we stand ready to continue to accept referrals January 1<sup>st</sup>, 2023.





Large Meeting Room



Private Office



Executive Office



Executive Office



Executive Office



Executive Office

FACTS has additionally grown to provide regularly scheduled assessment services at over 70 remote locations throughout Southern California. FACTS serves remote locations throughout Fresno County’s geographical boundaries, including DSS offices in Reedley and Selma. Our staff is highly qualified and experienced, as we have more Certified Vocational Evaluation Specialists (CVEs) and International Psychometric Evaluation Certification (IPECs) than any company or agency staff within California. FACTS organizational chart can be referenced as Addendum 5 page 175, detailing responsibilities and duties of our administrative and professional staff. Staff are based at our eight CARF accredited assessment centers located strategically through mid and Southern California. These centers include Anaheim, Bakersfield, Fresno, Long Beach, Los Angeles, Palmdale, Northridge and Thousand Oaks.

## **FACTS ADMINISTRATIVE OFFICE**

516 Pennsfield Place, Suite 108  
Thousand Oaks, CA 91360  
(805) 497-1685, FAX (805) 497-2525  
Contact: Andrea Foster, MA, CVE, PVE, IPEC

## **FACTS ASSESSMENT CENTERS**

### **Fresno**

2350 West Shaw Avenue, Suite 118  
Fresno, CA 93711  
(559) 721-7488, FAX (559) 721-7589  
E-Mail: [Fresno@FosterAssessment.com](mailto:Fresno@FosterAssessment.com)

### **Thousand Oaks**

516 Pennsfield Place, Suite 108  
Thousand Oaks, CA 91360  
(805) 497-1685, FAX (805) 497-2525  
E-Mail: [ThousandOaks@FosterAssessment.com](mailto:ThousandOaks@FosterAssessment.com)

### **Anaheim**

50 S. Anaheim Blvd., Suite 251  
Anaheim, CA 92805-2931  
(714) 635-5370, FAX (714) 635-5372

### **Bakersfield**

5121 Stockdale Hwy., Suite 250  
Bakersfield, CA 93309  
(661) 396-7863, FAX (661) 396-7865

### **Los Angeles**

1605 West Olympic Blvd., Suite 509  
Los Angeles, CA 90015  
(213) 353-0782, FAX (213) 353-0792

### **Long Beach**

3447 Atlantic Ave., Suite 215  
Long Beach, CA 90807  
(323) 206-4131, FAX (323) 206-4133

### **Palmdale**

1603 E. Palmdale Blvd., Suite E  
Palmdale, CA 93550-4880  
(661) 272-9397, FAX (661) 272-0181

### **Northridge**

16921 Parthenia Street, Suite 205  
Northridge, CA 91343  
(818) 996-2015, FAX (818) 996-6531

In addition to the above full-time assessment centers, FACTS has the ability to provide remote services to numerous cities to provide assessment and learning disability evaluation services in rural locations, including the following:

<i>Anaheim</i>	<i>Delano</i>	<i>Long Beach</i>	<i>Perris</i>	<i>Simi Valley</i>
<i>Adelanto</i>	<i>Downey</i>	<i>Los Angeles</i>	<i>Reedley</i>	<i>Taft</i>
<i>Bakersfield</i>	<i>Fresno</i>	<i>Mojave</i>	<i>Ridgecrest</i>	<i>Thousand Oaks</i>
<i>Barstow</i>	<i>Hemet</i>	<i>Moorpark</i>	<i>Riverside</i>	<i>29 Palms</i>
<i>Bell</i>	<i>Indio</i>	<i>Needles</i>	<i>Santa Ana</i>	<i>Ventura</i>
<i>Carson</i>	<i>Kerman</i>	<i>Norco</i>	<i>Santa Clarita</i>	<i>Victorville</i>
<i>Chatsworth</i>	<i>Laguna Hills</i>	<i>Northridge</i>	<i>Santa Paula</i>	<i>Yucca Valley</i>
<i>Coalinga</i>	<i>Lake Isabella</i>	<i>Ontario</i>	<i>San Bernardino</i>	
<i>Colton</i>	<i>Lancaster</i>	<i>Oxnard</i>	<i>Selma</i>	
<i>Cypress</i>	<i>La Sierra</i>	<i>Palmdale</i>	<i>Shafter</i>	

FACTS has been chosen to provide these services at numerous locations, not only due to the excellence of our staff, thoroughness of our services and variety of assessment and evaluation tools available to us, but importantly, FACTS is recognized as an unbiased provider of assessment services versus community colleges, colleges or training programs. These institutions may have a built in bias, favoring training as a recommendation (because assessment recommendations may impact ultimate referral to their own programs). Additionally, educational programs and counseling firms do not have the expertise and training in test interpretation nor the extensive testing instrument inventory as FACTS. Our firm specializes in the objective assessment of participants without bias, without limitation of testing instruments, and with the complete training of staff that accompanies a company dealing solely with assessments and evaluations for over 38 years.

No other provider can give this combination to CalWORKs participants at this time. This specialization has given FACTS' not only the ability to objectively provide unbiased assessment services, which has assisted us in becoming the major provider of CalWORKs assessments throughout California, but has also afforded us to opportunity to gather more test instruments specifically designed for CalWORKs participants in many languages, including (but not limited to) Spanish, Arabic, Armenian, Hmong, Farsi, Russian, Vietnamese, Laotian, Cambodian, and Punjabi.

FACTS understands that the County of Fresno is soliciting proposals from experienced and qualified service providers to provide, on the behalf of the Department, specialized assessments and development a Welfare to Work plan for CalWORKs WTW participants. These services are for adults ages 18-59 to assess for learning disabilities, language barriers, and other physical, mental, or psychological barriers that may prevent an individual from engaging in employment or educational training, with the goal of recommending appropriate accommodations. FACTS understands results from the assessments requested through this RFP shall assist the participant in making informed decisions about their educational, vocational training and/or employment goals. FACTS understands the purpose of the assessments includes but is not limited to provide an overall evaluation of the participants' aptitude, academic abilities, vocational skills and appropriate career planning.

For the services requested, FACTS will include at a minimum:

1. Limited English Proficiency Assessments
2. Learning Disabilities Evaluations
3. Independent Assessments
4. Conduct Informational Training Presentations for DSS Staff
5. Conduct Informational Training Presentations for DSS Job Readiness Program (JobWISE)
6. Produce WTW Client Orientation Video(s)

FACTS has and, if selected, will continue to provide all above services to CalWORKs WTW participants in accordance to the laws, regulations, and statues set forth in the California Department of Social Services, Manual of Policies and Procedures (MPPs) Eligibility and Assistance Standards Chapter 42-722, all Department of Social Services (CDSS) All County Letters (ACL), All County Information Notices (ACIN), and All County Welfare Director Letters (ACWDL) regarding department policy and procedures guidelines. FACTS will additionally continue to provide services in accordance to the Code of Ethics for multiple membership organizations involving best practices

for assessment and evaluation professionals such as Vocational Evaluation and Career Assessment Professionals (VECAP).

**Regarding Limited English Proficiency (LEP) Assessments**, the creation of the individualized participant WTW plan consists of four specific phases, which are outlined below. Each phase has been reviewed, scrutinized and improved over our 38 year history, and each phase provides a very specific portion of the overall plan. Limited English Proficiency Assessments are provided to all languages requested by the County. In the past contract period, FACTS has provided LEP services in Spanish, Arabic, Hmong, Laos, Punjabi, Dari, Ukranian, Russian, Persian, Farsi, Armenian, Vietnamese, and Cambodian. FACTS currently utilizes Telelanguage for language translation services for CalWORKs WTW participants who do not speak English or Spanish. Therefore, any language requested by the County is accommodated.

### **PHASE 1 – INFORMATION GATHERING**

1) At the beginning of day one, the assessor will conduct an orientation describing the purpose of the LEP assessment process to the participants. It will be emphasized to participants that the assessment process is designed to jointly help determine viable employment goals. Further, it is indicated that the assessment should be considered a simulated work environment; therefore, work readiness issues are addressed and documented. Further, the participant is given general information on how to perform their best on testing and an attempt is made to alleviate tension some participants may experience prior to testing.

2) An interview is conducted with each participant, at which time the personal data forms the participant has filled out upon entry are reviewed. The structured interview format is followed in which the assessor reviews not only the information provided by the participants, but also self-assessed language proficiency, work history, employment goals, personal problems, physical abilities, vocational preferences, as well as enthusiasm and attitude towards work. Recognizing the special needs of these participants is key as the interview process and employment barrier screening process are conducted at this stage to identify participants requiring supportive services in terms of physical or mental handicaps, chemical dependency, non-English or limited English proficiency, learning disabilities, domestic violence, and other employment barriers that may exist.

3) With regard to servicing non-English speaking or limited-English speaking participants, many of FACTS assessors are bilingual in English/Spanish, as a large percentage of participants solely speak Spanish. Approximately 50 percent of our pencil/paper tests and hand-on work samples are available in Spanish. Numerous other tests are pictorial in nature, and do not require reading comprehension or written ability to complete. FACTS chooses tests that are culturally non-biased, and that assess individual factors (i.e. learning ability) without diminishing a participant's score due to limited-English. See Addendum 6 page 176 for FACTS list of Assessment Instruments.

4) With regard to chemical dependency, mental handicaps and legal issues that have negatively affected employment, assessors are trained in spotting gaps in employment. Gaps frequently occur when incarceration, termination without warning, or dependency issues arise. In addition to our one-

on-one interview, assessors look for length of employment on the job to discern between moving up a career ladder and leaving due to employment difficulties, skill inabilities or terminations.

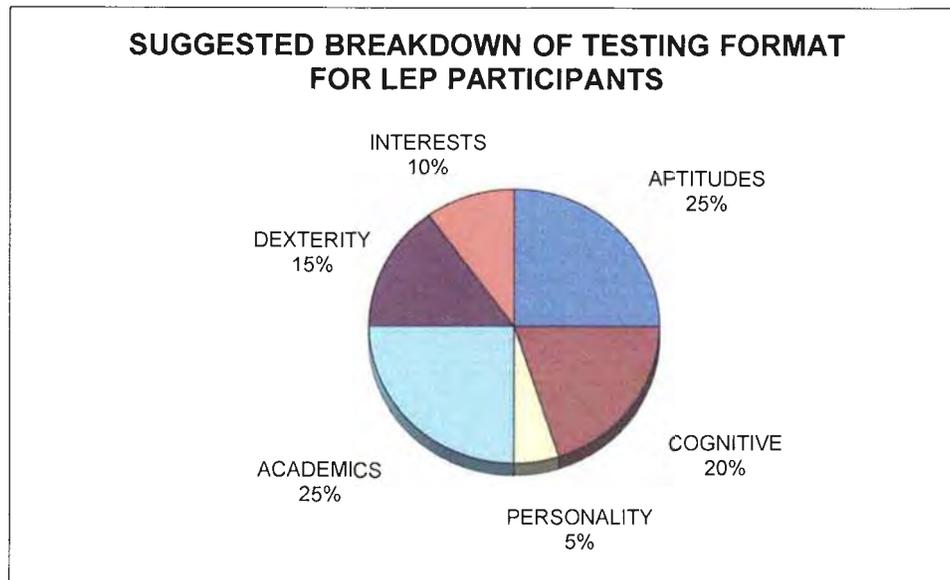
5) Analysis of physical handicaps and physical work tolerances are a specialty of FACTS' Assessors. Since almost all of our all Assessors also receive referrals from Workers' Compensation clientele, they are trained on how to read and understand medical reports, restrictions, diagnoses, and the muscular-skeletal system. Quarterly training of all Assessors covers a wide array of issues such as lower back injuries, carpal tunnel, head trauma, traumatic brain injuries and ergonomically safe work environments. All FACTS locations have a variety of physical work samples that allow an accurate assessment of physical tolerances, functional capacities and dependable performance of standing, sitting, bending, manipulating, kneeling, lifting, reaching, etc. Assessors are trained in the knowledge of medications, how to use the DSM-5 (Diagnostic and Statistical Manual of Mental Disorders). Reports very specifically document maximum physical tolerances, dependable tolerances and the types of physical motions that may occur on the job which negatively impact work speed, concentration, medication use and decrease productivity (work breaks, pain breaks and loss of productive time).

## **PHASE 2 – TESTING**

FACTS provides a very individualized assessment process in which the test instruments utilized may vary significantly depending upon the participant's educational background and vocational interests. Generally, the process begins with vocational interest inventories and personality indexes to assist in identifying the participant's vocational interests as well as determining the extent of their career awareness. All participants are assessed for basic academic skills in reading comprehension and math computation. This is important to assist in determining reasonable training modes and to identify participants that may need remediation in reading or math. FACTS utilizes a wide range of vocational skills and aptitude tests (including Spanish versions of tests and many non-verbal tests), as well as hands-on work samples as an individual approach based upon the participant's functional, educational, and interest levels. Generally, aptitude and work sample testing are directed towards specific identified areas of interest of the participant, such as clerical, service, technical, mechanical, or assembly work. Other assessment instruments assist in the gathering of data on work values, problem solving skills, and general learning ability.

Validated and recognized test instruments and assessment tools that FACTS utilizes in the assessment includes, but are not limited to basic skills tests (WRAT, GATES Reading Test), interest and/or attitude inventories (COPS, SDS), performance tests (over 30 work samples, i.e.: VALPAR, TOWERS, JEVS), personality (Myers-Briggs), work values (COPES), career evaluation/guidance instruments (County of Fresno Demand Occupations List), aptitude tests (over 50 individualized and general aptitude battery instruments to choose from inventory), structured interviews and behavioral observations. A wide array of vocational and employment interest inventories will be administered to participants including Career Occupational Preference System (COPS) or the Self Directed Search (SDS). These interest inventories are generally utilized in conjunction with the County of Fresno Demand Occupations List (Addendum 7 and 8, pages 213 and 217). Specific occupational clusters of interest are identified as well as the opportunity to review jobs that are actually in demand in the

local area. In this way, the participants are focused from the beginning on realistic jobs that are identified as growing within Fresno County.



To satisfy basic skills testing, English reading and vocabulary comprehension tests are administered, as well as an arithmetic computation test. Scores reflect grade level achievement in that subject matter. Clerical aptitudes, hands-on computer skills, typing skills and clerical speed and accuracy assessments are available through a multitude of written psychometric tests and hands-on work samples. Those participants expressing or showing interest in mechanical or technical occupations are administered hands-on work samples and written assessment instruments to verify their occupational choices. Personality indices are administered to clarify the participant's preferences and abilities regarding working in social settings, how the participant tends to acquire information (learning preference), their ability to work independently, their decision-making processes, and how they perceive themselves within the work environment. Work samples are excellent tools to assess those individuals with learning disabilities or for those that lack education. Work samples are object oriented and are non-verbal samples of work which can be utilized not only to evaluate vocational aptitudes, but also work behavior and characteristics in a simulated work environment. Work samples allow the assessor to evaluate not only specific aptitudes, but also behavioral observations and specific behaviors. The following are worker characteristics which can be garnered from use of work samples: ability to follow instructions, ability to maintain motivation, ability to concentrate on tasks, ability to make decisions, ability to control frustration levels, ability to conceptualize problems, ability to accept supervision, ability to complete tasks, ability to work alone and ability to complete a work task under time constraints.

FACTS utilizes a full work sample battery of Valpar work samples, as well as JEVS work samples, and a limited selection of Tower work samples. Numerous work samples are particularly well suited for limited-English speaking participants, as many simulate essential functions of a job or category the participant has deemed of interest. A complete list of all assessment and evaluation tests is included in this RFP as (Addendum 6, page 176).

### **PHASE 3 – INTERPRETATION OF ASSESSMENT RESULTS**

The assessor will explain test results to the participant, thus creating a clear picture for the participant of their potential relating to realistic locally available employment goals. An aptitude profile is calculated in order to review and take advantage of transferable skills. During Phase 3, information regarding the participant's personality factors, educational competencies, and functional level of work aptitudes will be incorporated into the job matching process based upon the Department of Labor job requirement profiles. Once the work in this stage is completed, the focus of several specific and realistic employment goals typically becomes clear.

Potential employment barriers to be identified during the assessment process include learning disabilities/cognitive limitations, educational remediation needs, limited non-English proficiency, transportation needs, childcare needs, negative behavior patterns affecting employment potential, lack of transferable skills, lack of work history, severity of disability, including areas of potential impact, if the learning disability will affect the ability to participate in WTW activities, substance abuse/chemical dependency, suspected co-existing disorders, mental health issues, domestic violence legal background issues and other factors which may negatively impact employment potential.

### **PHASE 4 – DETERMINATION OF MUTUALLY AGREED UPON EMPLOYMENT GOALS**

The assessor analyzes and discusses the test results with the participant. Jointly they review the occupational inventories, which have been completed, and they are compared with the assessment results. Since 2016, FACTS has worked closely with the County of Fresno to compile a list of occupations that takes advantage of available county training. The assessor then jointly agrees with the participant on employment goals in conjunction with their demonstrated language proficiency, interests and skills. The concept of the career ladders is discussed with each participant. Then the assessor initiates the WTW employment plan recommendations for the Job Specialist for subsequent inclusion in the WTW plan. The employment plan will consider factors based on a discussion of informed choice, including whether the goal is an in demand job in County, entry level requirements, wages, and the career ladder prospects. Comprehensive services involving the selection of employment goals and informed choice on the part of the participant include review of test results, analysis of need for basic skills training/remediation, review of non-traditional employment possibilities with female participants, discussion of career ladder within the contemplated job fields, review of growth potential of preferred job fields, review of the County of Fresno Job Demand List and EDD wage rate information, and joint agreement with participant on a primary employment plan recommendation. Jointly with the participant, a primary goal employment goal is determined for recommendation for the WTW plan. Employment barriers will be considered and may play an important factor in determining these goals, as well as is the motivation of the participant in terms of their attitude towards training and work.

FACTS will document in a comprehensive Limited English Proficiency Assessment report:

- (a) relevant vocational/educational background and history;

- (b) language proficiency and in their primary language;
- (c) identification of general cognitive levels, achievement levels and aptitude levels;
- (d) identification of any other issues, e.g., physical/mental problems;
- (e) areas of strength and employment potential in addition to areas of deficit/employment barriers;
- (f) a professional opinion of the significance of the participant's proposed or current employment activities and recommendations for subsequent assignment to employment activities;
- (g) participant's employment goal and recommendations for employment goal attainment (e.g., Certificate of High School Equivalency); and
- (h) the potential to benefit from ESL and/or adult basic education.

**Regarding the Learning Disabilities Evaluation**, plan phases are slightly different, as the goal is to determine if a learning disability or intellectual disability is present, and to identify accommodations when appropriate. A description of the learning disability evaluation is as follows:

### **PHASE 1 – INFORMATION GATHERING**

At the beginning of day one, the Evaluator will conduct an orientation describing the purpose of the learning disability evaluation (LDE) process to the participant. It will be emphasized to participants that the learning disability evaluation is designed to jointly help determine viable employment goals as well as any needed accommodations to help assist them in completing their WTW employment plan. Further, it is indicated that the evaluation should be considered a simulated work environment; therefore, work readiness issues are addressed and documented. Further, the participant is given general information on how to perform their best on testing and an attempt is made to alleviate tension some participants may experience prior to testing.

An interview is conducted with each participant, at which time the personal data forms the participant has filled out upon entry are reviewed. The structured interview format is followed in which the Evaluator reviews not only the information provided by the participants, but also work history, employment goals, personal problems, physical abilities, vocational preferences, as well as enthusiasm and attitude towards work. Recognizing the special needs of these participants is key, as the interview process and employment barrier screening process are conducted at this stage to identify participants requiring supportive services in terms of physical or mental handicaps, chemical dependency, non-English or limited English proficiency, learning disabilities, domestic violence, and other employment barriers that may exist.

In an effort to determine learning disabilities, as part of the initial interview we discuss with the participant mastery of cognitive domains and their everyday impact, as they may affect their work potential. Specific domains include:

- executive function;
- attention;
- sensory/perceptual/social;
- communication;
- social/emotional;
- motor skills; and
- learning/memory.

As noted, analysis of physical handicaps and physical work tolerances are a specialty of FACTS' Evaluators. Since almost all of our all Evaluators also receive referrals from Workers' Compensation

clientele, they are trained on how to read and understand medical reports, restrictions, diagnoses, and the muscular-skeletal system. Quarterly training of all Evaluators covers a wide array of issues such as lower back injuries, carpal tunnel, head trauma, traumatic brain injuries and ergonomically safe work environments. All FACTS locations have a variety of physical work samples that allow an accurate evaluation of physical tolerances, functional capacities and dependable performance of standing, sitting, bending, manipulating, kneeling, lifting, reaching, etc. Evaluators are trained in the knowledge of medications, how to use the current PDR (Physician's Desk Reference) and the most recent DSM (Diagnostic and Statistical Manual of Mental Disorders). Reports very specifically document maximum physical tolerances, dependable tolerances and the types of physical motions that may occur on the job which negatively impact work speed, concentration, medication use and decrease productivity (work breaks, pain breaks and loss of productive time).

With regard to non-English speaking or limited-English speaking participants, many of FACTS Evaluators are bilingual in English/Spanish, as a large percentage of participants solely speak Spanish. Approximately 50 percent of our psychometrics (pencil and paper tests) and hand-on work samples are available in Spanish. FACTS chooses tests that are culturally non-biased, validated, and that assess individual factors (i.e. learning ability) without diminishing a participant's score due to limited English.

## **PHASE 2 – TESTING**

Foster Assessment Center & Testing Service, Inc. (FACTS) utilizes only validated testing instruments to determine learning disabilities. The learning disability evaluation testing instruments utilized by our staff include all state-mandated learning disability tests for aptitude, information processing, achievement, and cognitive processing.

FACTS provides a very individualized evaluation process in which the test instruments utilized may vary significantly depending upon the participant's educational background and vocational interests. Generally, the process is begun with vocational interest inventories and personality indexes to assist in identifying the participant's vocational interests as well as determining the extent of their career awareness.

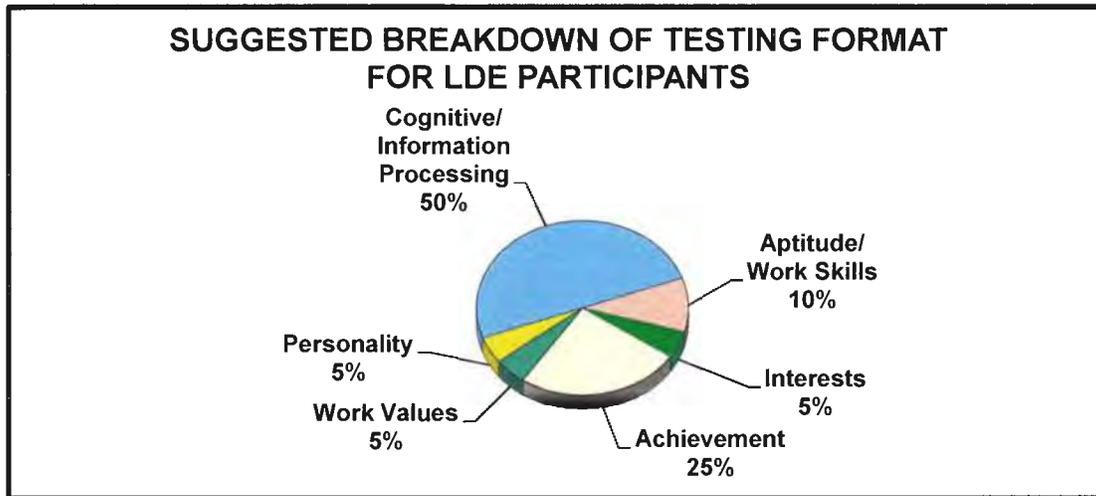
All participants are assessed for achievement skills in reading comprehension, spelling, and math computation. This is important to assist in determining reasonable training modes and to identify participants that may need remediation in reading or math and to correlate these scores to aptitude and information processing/cognitive testing to identify learning disabilities.

FACTS utilizes a wide range of vocational skills and aptitude tests (including Spanish versions of tests and many non-verbal tests), as well as hands-on work samples as an individual approach based upon the participant's functional, educational, and interest levels. Generally, performance and work sample testing are directed towards specific identified areas of interest of the participant, such as clerical, service, technical, mechanical, or assembly work. Other evaluation instruments assist in the gathering of data on work values, problem solving skills, and general learning ability.

Validated and recognized test instruments and evaluation tools that FACTS utilizes in the Learning Disability Evaluation include, but are not limited to:

- a. achievement tests (WRAT 5, TABE reading series, Gates Mac-Ginitie);

- b. cognitive tests/information process (Woodcock-Johnson IV; TONI-4, BETA-4);
- c. vocational interest inventories (SDS, COPS, Fresno County Demand Occupations List);
- d. aptitude/work skills tests (over 30 work samples, i.e.: VALPAR, TOWERS, JEVS);
- e. work values (COPES, WVI, WSA);
- f. personality (Myers-Briggs);
- g. structured interviews; and
- h. behavioral observations.



These work samples become extremely important to those participants that do not speak English or Spanish, as there is currently no validated testing instruments for learning disability evaluations other than in those two languages. FACTS is able to provide screening to participants who speak languages other than English and Spanish via a wide array of vocational tests. Employment interest inventories will be administered to participants including Career Occupational Preference System (COPS), the Self Directed Search (SDS), or numerous pictorial indices. The first two mentioned in interest inventories are generally utilized in conjunction with the Fresno County Demand Occupations List. Specific occupational clusters of interest are identified as well as the opportunity to review jobs that are actually in demand in the local area. In this way, the participants are focused from the beginning on realistic jobs that are identified as growing within Fresno County.

To satisfy achievement testing, English reading and vocabulary comprehension tests are administered, as well as an arithmetic computation test. Scores reflect grade level achievement in that subject matter.

Clerical aptitudes, hands-on computer skills, typing skills and clerical speed and accuracy evaluations are available through a multitude of written psychometric tests and hands-on work samples.

Personality indices are administered to clarify the participant's preferences and abilities regarding working in social settings, how the participant tends to acquire information (learning preference), their ability to work independently, their decision-making processes, and how they perceive themselves within the work environment.

Those participants expressing or showing interest in mechanical or technical occupations are administered hands-on work samples and written evaluation instruments to verify their occupational choices.

Work samples are excellent tools to assess those individuals with learning disabilities or for those that lack education. Work samples are object oriented and are non-verbal samples of work which can be utilized not only to evaluate specific vocational aptitudes, but also work behavior and characteristics in a simulated work environment. FACTS utilizes a full work sample battery of Valpar work samples, as well as JEVS work samples, and a limited selection of Tower work samples.

The following are worker characteristics which can be garnered from use of work samples:

- ability to follow instructions;
- ability to maintain motivation;
- ability to concentrate on tasks;
- ability to make decisions;
- ability to control frustration levels;
- ability to conceptualize the problem;
- ability to accept supervision;
- ability to complete;
- ability to work alone; and
- ability to complete a work task under time pressure.

Once a participant has been identified as having scores consistent with a learning disability, FACTS can then implement this information into practical applications for work. For example, if a participant is noted to have an auditory impairment and was assessed in the low average range for complex oral listening skills, the Evaluator can assess at what point this participant has problems with verbal instructions with work samples (i.e. with 1-8 step instructions). This would be particularly important if the participant also has a learning disability involving written words/instructions or oral directions. Therefore, not only can we test impairments empirically with normed tests, but also in general applications through work samples.

### **PHASE 3 – CONSULTATION/INTERPRETATION OF RESULTS**

The evaluator will explain to the participant their test results, thus creating a clear picture for the participant of their potential relating to realistic employment goals.

Potential employment barriers to be identified during the evaluation process include:

- severity of disability, including areas of potential impact;
- if the learning disability will affect the ability to participate in employment activities;
- learning disabilities/cognitive limitations;
- educational remediation needs;
- limited non-English proficiency;
- transportation needs;
- childcare needs;
- negative behavior patterns affecting employment potential;
- lack of transferable skills;
- lack of work history;
- substance abuse/chemical dependency;
- suspected co-existing disorders;

- mental health issues;
- domestic violence; and
- other factors which may negatively impact employment potential.

The Evaluator will attempt to not only identify these employment barriers, but also recommend potential solutions and accommodations to these employment barriers including:

- (1) WTW employment plan;
- (2) basic skills instruction including specialized instruction for a variety of separate and distinct groups such as learning disabled, non-English speaking, low functioning, and illiterate adults;
- (3) supported work;
- (4) documentation of accommodations and assistive technology needs for other purposes (i.e. remediation, living skills);
- (5) recommendation if the proposed or current employment activities are appropriate;
- (6) impairment skills instructions;
- (7) problem solving skills;
- (8) life skills;
- (9) job retention services;
- (10) vocational training;
- (11) mental health services;
- (12) domestic violence services;
- (13) substance abuse services; and
- (14) other necessary services to obtain employment.

The evaluator analyzes and discusses the test results with the participant. Jointly they review the occupational inventories, which have been completed, and they are compared with the evaluation results. The evaluator then jointly agrees with the participant on an employment goal. The concept of the career ladders is discussed with each participant. Then the evaluator initiates the employment plan recommendation for the Job Specialist for subsequent inclusion in the employment plan.

The employment plan will consider factors based on a discussion of informed choice, including whether the goal is an in-demand job within Fresno County, entry level requirements, wages, and the career ladder prospects.

Consultation services involving the selection of an employment goal and informed choice on the part of the participant include:

- review of test results;
- analysis of need for any reasonable accommodations;
- analysis of need for basic skills training/remediation;
- review of non-traditional employment possibilities with female participants;
- discussion of career ladder within the contemplated job fields;
- review of growth potential of preferred job fields and EDD wage rate information;
- transferable skills analysis; and
- joint agreement with participant on an employment plan recommendation.

Jointly with the participant, a primary goal employment goal is determined for recommendation for the employment plan. The level of learning disability, if any, as well as other employment barriers will be considered and may play an important factor in determining these goals, and any needed reasonable accommodations. Further, the motivation of the participant in terms of their attitude towards training and work will be considered.

#### **PHASE 4 – FINAL RECOMMENDATIONS/LEARNING DISABILITY EVALUATION REPORT**

FACTS acknowledges that the overall purpose of the evaluation is to provide objective evaluation results in a comprehensive evaluation report format to the Job Specialist for utilization in the development of the employment plan. Further, the evaluation report will detail the participant's employment potentials, employment barriers, and recommended any needed reasonable accommodations.

FACTS will document in a comprehensive Learning Disabilities Evaluation report:

- (a) relevant vocational/educational background and history;
- (b) identification of any learning disability/general aptitude/cognitive level;
- (c) other issues, e.g., physical/mental problems;
- (d) areas of strength and employment potential in addition to areas of deficit/employment barriers;
- (e) range of recommended reasonable accommodations/assistive technology for the participant's employment plan;
- (f) a summary (including severity of disability; areas of potential impact; rationale for learning disabilities determination/diagnosis; and recommendations for additional services);
- (g) an identification of local resources to assist with employment plan;
- (h) a documentation of accommodation/assistive technology needs for other purposes (e.g. driver's license exam, GED exam);
- (i) recommendations if additional tests are needed;
- (j) the individual's learning disability and how it will affect his/her ability to participate in employment activities;
- (k) a professional opinion of the significance of the participants proposed or current employment activities and recommendations for subsequent assignment to employment activities;
- (l) participant's employment goals and an evaluation of their attainment;
- (m) a list of goals identified, a timeline to achieve the goals and the resources necessary;
- (n) an identification of suspected co-existing disorders.

The final LD evaluation report can also be a tool for case management, basic skills educators, and vocational training personnel. The purpose of the report is to document the selection of a realistic employment goal, identification of learning disabilities, the appropriateness of the decision-making, individual participant needs, barriers to employment, and the recommendations and planning to overcome these obstacles to employment.

The following components will be included in the Learning Disability Evaluation report:

- (a) participant's name and case number;
- (b) dates participant was administered test and interviewed;
- (c) list of tests administered to participant;

- (d) participant's work history and employment skills along with educational history and present competency level;
- (e) scores and interpretation of any and all test administered to the participant;
- (f) participant's employment goals and evaluation of attainment possibility;
- (g) realistic employment goal and timeline to achieve that goal as well as necessary resources;
- (h) recommendations for the participant's subsequent assignment to employment activities;
- (i) identification of any learning disability as well as any recommended reasonable accommodations; and
- (j) signature by Evaluator on the report.

FACTS is clearly able to provide the requested services within the scope of our current operations.

- f.** *Copies of the audited Financial Statements for the last three (3) years for the agency or program that will be providing the service(s) proposed. If audited statements are not available, compiled or reviewed statements will be accepted with copies of three years of corresponding federal tax returns. This information is to be provided after the RFP closes, if requested. **Do not provide with your proposal.***

Copies of the audited Financial Statements for the last three (3) years will be provided upon request. If audited statements are not available, compiled or reviewed statements for the prior three years of corresponding federal tax returns will be provided.

- g.** *Describe all contracts that have been terminated before completion within the last five (5) years: 1. Agency contract with; 2. Date of original contract; 3. Reason for termination; 4. Contact person and telephone number for agency*

FACTS has never had a contract that has been terminated prior to completion within the last 5 years, or for that matter, within its 38 year history.

- h.** *Describe all lawsuit(s) or legal action(s) that are currently pending; and any lawsuit(s) or legal action(s) that have been resolved within the last five (5) years: 1. Location filed, name of court and docket number; 2. Nature of the lawsuit or legal action*

FACTS has not had any lawsuit(s) or legal action(s) that are currently pending, nor have had any lawsuit(s) or legal action(s) that have been resolved within the last 5 years.

- i.** *Describe any payment problems that you have had with the County within the past three (3) years: 1. Funding source; 2. Date(s) and amount(s); 3. Resolution; 4. Impact to financial viability of organization.*

FACTS has not had any payment problems with Fresno County within the past 3 years, or in its 38 year history.

## K. SCOPE OF WORK

1. **SERVICES** *Describe how your agency proposes to carry out the requested services. Include: the process for scheduling participants, the length of time between initial referral and contact with participant, the strategies used to contact hard to reach participants, the length of time necessary for an average assessment, the number of assessments that can be conducted per month, and the proposed services schedule that works best within your business operations.*

As the current provider of this service, FACTS is exceptionally familiar with how to carry out the requested services. Regarding scheduling participants, FACTS has developed a weekly testing schedule with the County that allows the referring Job Specialist to select an assessment or evaluation date/time that works best for the participant. The assessment activity is entered into CalWIN by the Job Specialist. Each week, the FACTS liaison will email a referral roster and the referral packets that were entered into CalWIN and who are scheduled for testing the following week. Additionally, for the prior six years, and with the County's approval, FACTS has been flexible with scheduling participants to the point of accepting walk-ins on the same day of service. FACTS has kept in close contact with County referral sources to remain as accommodating as possible in order to service all participants referred. With regard to the rural locations, FACTS has changed the schedule numerous times, at the request of the County, in an attempt to serve as many participants as possible.

The strategy to engage the client begins before the participant arrives, as FACTS emails and/or mails the referred participant a reminder letter which answers several questions regarding the purpose of the assessment, reminds them of the appointment times and date, and provides map and bus route information. Additionally, the FACTS website ([www.FosterAssessment.com](http://www.FosterAssessment.com)) has maps, addresses, hours, contact phone numbers and accessibility information to assist participants with attendance. Additionally, these emails answer questions regarding what to expect from the assessment, details benefits and services the participant can expect by attending, and attempts to decrease test anxiety via further elaboration of expectations and encouragement. Lastly, FACTS' staff members place confirmation calls at various times throughout the day in order to contact the participant regarding their scheduled assessment. They are reminded of the assessment appointment and the need to set up child care, arrange transportation, and rearrange any appointments for the entire assessment day (9:00 am to 3:00 pm). A reminder of the assessment is broadly written on a mailed card so they will have the time, date and address at their fingertips. If the participant has limited English skills, emphasis is placed on phone calls and/or written documentation in their language. FACTS recognizes that some participants are working, and therefore special arrangements can be made through the Job Specialist for alternate non-traditional hours (evenings and weekends) throughout the County of Fresno. If a participant is a no show, FACTS makes repeated attempts, daily, to contact the participant and the Job Specialist to reschedule.

FACTS recognizes the need to provide services within the geographical boundaries of Fresno County, as we currently provide services at the Reedley and Selma DSS Regional offices. FACTS has been readily available to travel to DSS district offices as allowed, and will continue to be available to serve participants on an as needed basis. FACTS remains flexible with scheduling according to the needs of each DSS regional center, making changes to the schedule as requested by the County. FACTS staff can transport our assessment services, testing instruments, and some work samples to a number of sites throughout Fresno County, including rural areas. At DSS district offices we require a quiet and adequate conference room for group testing and a private interview room for individual testing and discussion.

Regarding offering supplemental online access to rural clients, FACTS is able to provide virtual evaluations via online tests, mailing of various testing instruments, online assessment and live video sessions for learning disability evaluations. Virtual Limited English Proficiency Assessment can be provided if testing is available online in the participant's primary designated language.

Regarding a timetable detailing length of time between initial referral to bidder and contact with the participant, note that FACTS has a well-developed referral/contact methodology utilizing the proprietary software program, FACTSTRACK. This Microsoft Access based software is customized to provide confirmation letters to participants on the same date of referral. FACTSTRACK is able to track attendance weekly and produce monthly billing information on participants as they proceed through the assessment.

FACTS will minimize the time between initial referral and contact with the participant by scheduling assessments at the request of the county and remain flexible to the needs of the district Regional centers. Typical length of time from referral to contact of the participant is within one day. The assessment is generally within one week at our FACTS Fresno location, and two weeks within rural areas where staff travels.

Regarding scheduling hard to reach participants, FACTS has learned within its 38-year history how to best contact participants in order to schedule assessments. As noted previously within this RFP, FACTS addresses the potential for no show problems that may occur prior to the actual assessment. FACTS attempts to minimize no show rates by providing the County of Fresno with brochures and handouts which are utilized as not only a “reminder appointment card” but a blurb encouraging the participant to attend. The Job Specialist is able to hand this information to the participant upon scheduling the assessment. As noted, a copy of this brochure is included in this proposal as (Addendums 12-15, pages 254- 259) These brochures can be printed in English and Spanish and fully explain not only the date, time and address of the assessment, but also what the assessment measures, how the participant benefits from attending, and the overall goals of the program. Encouraging phrasing is utilized, with emphasis on positive results. Additionally, FACTS has held training with County staff regarding the learning disability screening within OCAT and how to encourage participants to attend the Learning Disability Evaluation (LDE). Numerous Fresno County staff training meetings have been held at our facility to assist in explaining the Limited English Proficiency (LEP) assessments, to make certain each participant understands the assessment will be conducted in their primary language and to assist in removing any nervousness the participant may have regarding attendance in these all-important services.

FACTS can provide assessments services to all referred CalWORKs WTW participants in a timely manner. The usual length of time for completion of each assessment is as follows:

- Limited English Proficiency: All LEP assessments are a one-day process (five to eight hours) that are completed on the same day. However, if extenuating circumstances arise, FACTS is willing to extend the assessment to two days for those participants requiring such.
- Learning Disability Evaluation: FACTS can complete the LDE in one day provided there are three or less participants per vocational evaluator. If four or more participants are expected, and the evaluator is off-site (from our Fresno assessment center) and working on their own, the evaluation may take up to two days.
- Independent Assessments: FACTS can complete the IA in one day or less, as generally a review of case materials of the prior assessment is required (third party). However, FACTS believes that a strong portion of the independent assessment is not only determining the participant’s current achievement and grade levels, but also a reflection of their cognitive ability (in order to determine the participant’s ability to learn and benefit from services). If cognitive testing has not been completed, it is oftentimes unfair to the participant to approve or disapprove a WTW employment plan without full knowledge of potential to succeed. FACTS will provide this testing when necessary, and complete the independent assessment within the one day.

A unique feature of FACTS assessment process is that we allow the Job Specialist to tailor the assessment referral to the needs of the participant. For example, in the case of a severely disabled individual, one with special needs, one requiring specialized accommodations and/or one requiring specialized ADA modifications, FACTS is able to provide a full objective two-day assessment or modified one-day

assessment, as are both available choices for the Job Specialist, depending on the needs of the participant. For participants requiring specialized services (ADA issues), FACTS will contract those individuals by phone to ascertain accommodations needed prior to the scheduled assessment.

As noted, a Limited English Proficiency (LEP) Assessment occurs over one day (five to eight hours) will identify the level of English proficiency a participant has, and how to best serve their needs in gaining self-sufficiency. The results of the LEP will be used to create a WTW plan that will guide the participant in gaining English language proficiency. However, the LEP can be expanded to a full two-day assessment, and is a more appropriate service for participants that are unfocused, have limited transferrable skills, are unaware of the labor market and/or demonstrate difficulty with basic skills. FACTS has numerous hands-on work samples available which provide the assessor the ability to identify skills of the participants which relate to essential functions of jobs, and to evaluate individuals with physical disabilities. FACTS staff is fully trained on physical and mental disabilities, and is able to fully discuss employment options given the physical parameters of the job, the physical components of the essential functions of the job, the lifting requirements and the amount of sitting and/or standing. These physical components are oftentimes overlooked within the assessment process with other assessment providers, leading to wasted expense on formal training and/or resume development if the participant is unable to perform the functions of the job. Numerous participants struggle with residual physical restrictions from older injuries, internal allergies/asthma, birth defects, mental issues, etc. FACTS assessors are trained and able to testify in Workers Compensation cases regarding the appropriateness of job selection given various physical/mental issues, and are experts in this regard. Further, FACTS assessors are trained with regard to the selection of employment goals given the participant's background and legal record, and are trained to assist in employment selections when limitations exist.

FACTS is able to assess significantly more than the estimated quantity of referrals as listed in the solicitation, as our schedule is very flexible. FACTS currently accommodates up to twelve (12) LEP assessments per week, or 48 per month. We accommodate up to eight (8) Learning Disability Evaluations per week, or 32 per month. It is important to note that the above noted weekly assessment schedule has changed to best meet the changing needs of the County. However, FACTS remains very flexible when requests are made from the County of Fresno, and prides itself on the open channels of communication when attempting to reach as many participants as possible, not only with the city of Fresno, but encompassing all district regional and rural areas.

1. **SERVICES** Describe the location of the proposed service site(s). Include if the required space is currently available, details about your facility, and how the proposed locations will meet the needs of the target population.

In 2016, upon initial award of this contract, FACTS opened a central assessment site within metro Fresno. Our address is 2350 West Shaw Avenue, Suite 118, Fresno, CA 93711. A map of our Fresno Center can be found in Addendum 16, page 260. Since the inception of our Fresno assessment center, we have maintained the highest standards available to an assessment center, the CARF accreditation standards. FACTS Fresno evaluation center is the only vendorized assessment and evaluation center in the Fresno County that is CARF accredited, and, thus, is fully accessible to the handicapped population. Pictures of our Fresno Center can be viewed on Page 36 and 37, as well as within the FACTS Training PowerPoint in Addendum 2, page 80.

The professional design of the assessment center offers unique benefits to the CalWORKs program in its layout with ample test floor space for diagnostic testing equipment, and work samples, a shop room, conference room, and Vocational Assessor offices for one-on-one interviews and conferences with participants. The FACTS Fresno evaluation center is spacious and maintains abundant tests, work samples and computer access for online testing for Fresno County participants. This space allows for a wide range of testing equipment, and over 150 work samples and diagnostic test instruments, utilized for evaluation of learning and physical disabilities, (including a complete testing set of Valpar, JEVS and Tower work sample

systems) and over 200 psychometric assessment test instruments. We provide numerous other resources for participant use, including labor market data, occupational sources, and job readiness data. For a list of most testing instruments, please see Addendum 6, page 176. For visually impaired participants, all FACTS centers are equipped with a CCTV to enable the visually impaired to read written material and to enhance some hands-on work samples. For deaf participants, we use Zoom for video sign language interpreting services off-site. At the center, FACTS has high speed optical internet connection for computer workstations, laptop computers for staff, testing computers for participant use, computer printers, and a photocopier/scanner.

A benefit of our CARF accredited center is that it allows FACTS to provide a simulated work setting uniquely allowing for behavioral observations of CalWORKs participants performing the essential functions of various occupations. FACTS also documents work readiness skills such as the ability to accept supervision, punctuality, work behaviors, grooming, speed of manual dexterity tasks, and physical functioning (standing, sitting, lifting, etc.) as needed (when a participant indicates an interest in an employment goal that may be contradictory to their physical capabilities). Numerous work samples are available, which provide the assessment staff the ability to identify worker characteristics such as frustration tolerance, planning and organization, ability to concentrate, dexterity, use of hand tools, measuring ability, and many more.

Further, in order to minimize transportation difficulties, FACTS provides maps, mailed confirmation letters, as well as accessible bus routes to all referred participants. FACTS also maintains transportation information on our website, which is updated as needed, allowing easy access to information regarding address and locations of assessment sites. The FACTS Fresno center is located on a major bus line and has ADA accessibility to and from nearby bus stops, making our center fully accessible to referred participants. FACTS provides parking spaces for participants' free and exclusive use and provides parking for disabled persons in accordance with ADA statutes. In order to minimize problems with transportation, FACTS will be available during non-traditional hours (evenings and weekends) throughout the County of Fresno.

1. **SERVICES** *Describe if your agency will be able to provide the optional additional requested services. If so, specify which, and, as applicable, include your agency's plan to train DSS staff, present to DSS contracted service providers, and/or, provide an informational participant video.*

FACTS is proud of the informational training presentations we have provided to DSS staff, WTW participants and department contracted service providers over the past six years. FACTS is able to continue to provide all additional requested services, including informational training presentations for DSS staff and DSS WTW job readiness (JobWISE) participants as well as produce a new WTW client orientation video each year. Since 2016, we have gone above and beyond to provide all trainings whenever requested, and have received frequent compliments on our informational content, willingness to provide additional training and flexibility of requested timeframes. For example, the current contract requested we provide training sessions for county employees at least twice per year. In fact, FACTS has provided county wide training sessions approximately five times per year.

Fresno County DSS has requested training to be held at our center specifically because of its spaciousness and proximity to county offices. FACTS had held numerous open houses for the County of Fresno at our site in order for new Job Specialists, program supervisors, other DSS contracted service providers and contract staff to become familiar with not only the location our assessment center, but to view the numerous psychometrics, work samples, testing procedures, meet all staff members, and view various standardized forms we offer to CalWORKs participants. These training sessions are generally one to two hours in duration and we have held both morning and afternoon sessions. Preparation of handouts, flyers, testimonials, referral forms and sample reports have been distributed at all training sessions. These open houses have been well attended, and have increased the flow of communication between our agencies.

We have additionally held training at rural DSS regional offices and at the County of Fresno DSS central location. We have also provided numerous virtual training sessions via Microsoft Teams to reach a larger amount of job specialists virtually since the COVID-19 pandemic. FACTS has the goal of providing the best assessment and evaluation services, while reaching as many individuals as possible. Recent implementation of presentations directly to participants has greatly impacted referrals for the program, especially encouraging job readiness participants (JobWISE) to participate in a learning disability evaluation. We feel that opening the lines of communication between Job Specialists, program/contract management and FACTS assessors/evaluators via frequent training sessions facilitates this goal. It also allows us to stay abreast of any changes that the County may be implementing, and allows us to work hand-in-hand with new and improved strategies regarding scheduling, service, labor market changes and any other request made of us. A sample of the PowerPoint presentations specifically made for the County of Fresno trainings are attached as Addendums 2 and 3 on pages 80 and 128.

1. SERVICES *Describe how your agency will ensure adherence to the service implementation date of January 1, 2023 and provide an implementation timeline.*

Since FACTS is the current provider of these services, there will be a seamless transition to the new program year, with no downtime for implementation of services. Our organization has always met all timelines associated with this contract, and will continue to do such by continuing to take referrals during the last week of the fiscal year, and during the first week of the new contract. There is no planned change in staff, facility, or administrative services, as we are able to provide the least disruptive continuation of all requested services and training.

1. SERVICES *Provide any additional information regarding the requested services.*

The services we provide, including the four phases of the Limited English Proficiency Assessment, Learning Disability Evaluation and Independent Assessment are specifically outlined on pages 40 to 50. Additionally, FACTS has developed a County Demand Occupations List which helps focus participants on in-demand jobs available in the county (see Addendum 7 and 8 pages 213-217). FACTS has valuable experience developing demand jobs lists by county in conjunction with the resources of the local EDD and local Social Services agencies. The demand list indicates the job's work description, wage levels, educational requirements and whether local vocational training programs in County are available. FACTS uses an outside research consultant to update the Demand Jobs List annually. FACTS has developed a County Demand Occupations List and Demand Jobs Summary for Fresno County.

2. ORGANIZATION AND STAFF QUALIFICATIONS *Provide a summary of your agency's previous experience in providing assessments.*

At present, FACTS provides CalWORKs WTW assessment services in eight counties within Southern California, including the County of Fresno. FACTS clearly understands the services to be provided and the target population to be served for this contract, as we are the current provider to the County of Fresno and have been the provider since 2016. Limited English Proficiency, Learning Disabilities Evaluation and Independent Assessments are a specialty of the company, as FACTS is the largest provider of these types of services in the State of California, and has maintained this ranking for decades. These assessment services have been continuously provided for the past 38 years throughout California, and in that timeframe we have serviced over 250,000 CalWORKs WTW participants. FACTS has never been dropped as a provider of these services since the inception of each contract. Please see our Current List of CalWORKs and Similar Contracts Chart listing a description of similar or related contracts on pages 17-20.

2. **ORGANIZATION AND STAFF QUALIFICATIONS** *Describe your agency's staff who will carry out the requested services. Include if staffing is currently available, and relevant staff experience, qualifications, and certification or licensing for administrative and/or fiscal staff.*

A brief description of direct service staff is listed below. FACTS evaluation staff is qualified beyond the requested minimum qualifications listed in this RFP. Staff at our Fresno center are fully trained, fully qualified, and have years of experience with providing services under this contract. For a more detailed description of employees that can provide services, please see Addendum 4, Resumes page 150.

**Andrea Foster**, M.A., C.V.E., I.C.V.E., P.V.E., I.P.E.C., A.B.V.E., Founder and CEO, has a Master's Degree in Counseling Focused Human Resource Management and has over 38 years of experience as a Vocational Assessor/Evaluator, is nationally certified as a Certified Vocational Evaluator (C.V.E.), International Certified Vocational Evaluator (I.C.V.E.), Professional Vocational Evaluator (P.V.E), is a Diplomate with the American Board of Vocational Experts (A.B.V.E.) and is certified in International Psychometric Evaluation (I.P.E.C.). Her specific degree emphasizes managing an individual's resources/skills within an assessment and evaluation situation. She has conducted tens of thousands of vocational assessments and learning disability evaluations. As **Director of Services and Project Manager**, she oversees the hiring and training of new personnel, as well as performance reviews and examines new test instruments for updates to FACTS' testing instruments inventory. See attached resume.

**Katie Foster**, M.A., has a Master of Arts in Psychology with an emphasis in Career Management and Counseling from University of the Rockies. She has over fifteen years of experience as a Vocational Assessor, Learning Disability Evaluator, **Quality Assurance Supervisor** and **Chief Operating Officer** with FACTS. Katie has been involved with the implementation of this contract since its inception in 2016, has attended every DSS quarterly meeting, and sends monthly MAR reports and invoicing to the County. As COO, she handles staff quality assurance monitoring, reviews assessment and work evaluation reports, manages corporate compliance issues and oversees contract implementation. Katie is also responsible for coordinating, implementing and presenting at quarterly Evaluator and Technician staff trainings. She has worked with hundreds of CalWORKs participants in Ventura, Riverside and Los Angeles Counties. Katie trained for learning disability evaluations (Woodcock-Johnson IV cognitive tests and academic tests) under the direction of noted LD Evaluation Licensed Educational Psychologist, Dr. Michael Haas. See attached resume.

**Esmeralda Apresa**, M.A., Human Behavior Psychology from National University is the **Director of FACTS Fresno** center. She initially served in the role of Secretary and Vocational Technician when FACTS first opened our center in Fresno in 2016. She has chosen to continue her education in the field of psychology in order to best understand and assist CalWORKs participants as well as the FACTS professional evaluation staff in their duties, first obtaining her B.A. (Psychology) in 2020, and progressing to her M.A. in 2022. She is fully bilingual (English/Spanish). She has conducted hundreds of Learning Disability Evaluations and Limited English Proficiency Assessments for the County of Fresno. Esmeralda additionally has conducted multiple trainings for Fresno DSS staff, job specialists and DSS WTW Job Readiness program (JobWISE). See attached resume.

**Silvia Lopez**, B.A., has a Bachelor of Arts degree in Sociology from California State University Fresno (2020) is a **Vocational Assessor** at the FACTS Fresno center. She is bilingual in English and Spanish, and has been employed with FACTS since July 2022. As a Vocational Assessor she has conducted numerous Limited English Proficiency assessments for the County of Fresno CalWORKs WTW

program. Silvia has conducted training for Fresno DSS staff and job specialists, and assists in performing LEP assessments both in Fresno and the district offices in Reedley and Selma.

FACTS Fresno staff also are:

- Experienced in working with adults, especially those with barriers to employment.
- Qualified to conduct tests to identify learning disabilities and determine appropriate accommodations for individuals with learning disabilities.
- Maintain an understanding of the CalWORKs program, its goals, services, and operation.
- Maintain knowledge of the local labor market.
- Maintain knowledge of the availability of local educational, training and learning disability resources.

Additionally, the CEO and COO supervise fiscal staff within the administrative office regarding all aspects of this contract, including invoicing, monthly billing, receipt for services, downloading of accounting information for auditing purposes and timely deadlines. As a major provider of government and state contracts, FACTS is regularly monitored and financially audited on a quarterly basis to ensure program objectives/goals are completed on time and within budget. All financial reports and general journals are viewed by an outside Certified CPA Auditor, Donna Feder & Tom Duffy, on a quarterly basis. An independent comprehensive financial annual report is completed with outstanding rankings. See letter from describing FACTS' outside quarterly auditing procedure on page 30. The fiscal staff within FACTS administration has been with the company for 20+ years and is well versed in all aspects of invoicing, accounting, month-end tallies, auditing and mandated monthly/quarterly forms requested by each County.

2. ORGANIZATION AND STAFF QUALIFICATIONS *Describe how your agency will provide oversight/supervision of staff.*

The Quality Assurance Supervisor will provide oversight/supervision of staff and cover on-site monitoring of the existing Fresno staff to make certain staff continues to provide quality, objective assessment services to all referred participants. This position is shared by two highly experienced FACTS staff members (Andrea Foster, MA, and Katie Foster, MA) who are qualified to fill this role. Oversight is conducted on a daily, weekly and monthly basis, and includes how well staff met required deadlines (i.e. contacting participant, generating report) the content of the final report, the selection of test data, the documentation of outcome statistics, the interaction with referred participants, and the feedback provided by both participant and referring Job Specialist. FACTS performance measure outcomes chart specific to services to the County of Fresno are detailed on Addendum 18 on page 268.

2. ORGANIZATION AND STAFF QUALIFICATIONS *Describe your agency will ensure that cultural and/or linguistic sensitivity is included in all aspects of program planning and service delivery.*

Our many years of experience have assisted FACTS in formulating an assessment process which is culturally and linguistically appropriate. All services, publications, and FACTS offices are fully accessible to meet the physical and linguistic abilities of all participants. We currently have a wide array of psychometric and work sample testing available in Spanish. In those instances where participants have limited ability to communicate in English, they are able to take advantage of the wide array of non-verbal and hands-on work sample testing. Limited English Proficiency assessments are provided to all languages requested by the County. In the past contract period, FACTS has provided LEP services in Spanish, Arabic, Hmong, Laos, Punjabi, Dari, Ukrainian, Russian, Persian, Farsi, Armenian, Vietnamese, and Cambodian. FACTS currently utilizes Telelanguage, a full-service language company that provides on-demand interpreting services for over 350 languages for CalWORKs WTW participants who do not speak English or Spanish. Therefore, any language requested by the County is accommodated.

FACTS staff deals with illiteracy by having a wide array of test instruments that are not verbal. We have over 50 work samples which are hands on in nature, which generally do not require verbal fluency in English. These allow a demonstration of many worker characteristics, skills and aptitudes to be demonstrated despite the inability to read or write English. Some test instruments have had the questions put onto playback recorder. Further we offer a wide battery of interest inventories and cognitive indices which are non-verbal in nature to assess participant's interest levels (Career Occupational Preference System-Pictorial, Reading-Free Vocational Interest Inventory, Picture Interest Career Survey) and to assess cognitive-general learning ability (Reynolds Adaptable Intelligence Test-Nonverbal, RAVEN Standard Progressive Matrices, and TONI 4) as well as the before mentioned array of hands-on work samples. It should be noted that FACTS staff assess several hundred illiterate participants in our centers each year, as we are well equipped to provide services to this population.

With regard to non-English speaking or limited English speaking participants, many of FACTS Evaluators are bilingual in English/Spanish, as a large percentage of participants solely speak Spanish. Approximately 50 percent of our psychometrics (pencil and paper tests) and hand-on work samples are available in Spanish. FACTS chooses tests that are culturally non-biased, validated, and that assess individual factors (i.e. learning ability) without diminishing a participant's score due to limited English.

3. DOCUMENTATION AND RECORD KEEPING *Describe your agency's process for documenting participant assessment outcomes, the parties responsible for documentation and the time allocated for documentation.*

Participant assessment outcomes are gathered in a comprehensive report that includes all aspects of the assessment/evaluation, including test results, participant background, job readiness skills, education and training, work history, areas of strengths, deficits/barriers, learning disability identification (if applicable), employment goals (jobs of interest), labor market information and recommended activities for the primary employment goal. The vocational evaluator is responsible for initial scoring and documentation of test results (completed on a daily basis), the Center Director is responsible for generating the report (completed within five business days of completion of the assessment/evaluation), the Quality Assurance Supervisor is responsible for review of report outcomes (same day) and downloading encrypted information to the cloud in order to maintain documentation of assessment outcomes (completed on a weekly basis).

Another example of documentation of assessment outcomes that we offer is graphically depicted in our Feedback Summary. Since the inception of our services in 2016, FACTS has requested each participant that completes a Limited English Proficiency Assessment, a Learning Disability Evaluation or an Independent Assessment complete a Satisfaction Feedback Form. FACTS receives hundreds of Participant Satisfaction Feedback Forms from Fresno County CalWORKs participants. The results are tabulated and provided to Job Specialists and contract management. Recent Satisfaction Feedback Summaries for both participants and Job Specialists are attached as Addendum 10 and 11, pages 236-248. FACTS is proud of these results, which typically depict an overall 95%+ satisfaction rating. Further, FACTS is proud of the Satisfaction Feedback Forms received from Job Specialists throughout the County of Fresno. These forms are directly sent first to the County (via Job Specialists) and then forwarded to FACTS from Fresno contract management. Hundreds of feedback forms have been received, with very positive results. Overall, FACTS received an average positive ranking of 98%. Questions asked included:

- Was the report easily understandable and include all pertinent information?
- If you had questions regarding the report, was the assessor responsive and helpful?
- Were you satisfied with the testing administered?
- Were you satisfied with the vocational recommendations and findings?

FACTS has developed our own unique proprietary software called "FACTSTRACK." This database software program, operating from a Microsoft Access database, allows for specific tracking of participant

data including referral date, type of assessment service, dates of services, services worker name and assessor name. This computer software creates a referral confirmation letter and a monthly services report for all contracts indicating all participant names, case numbers, specific type of assessment service, dates of service, and date participant report e-mailed to the services worker. FACTS clerical staff enters participant data into FACTSTRACK, creating the weekly FACTSTRACK Referral/Attendance logs which are used by the FACTS clerical staff to create month-end services report detail. As for cross-checking, the FACTS Director must sign off on FACTSTRACK weekly attendance logs, and Assessors must sign off on their FACTSTRACK monthly invoice detail. The final monthly services report for each contract are reviewed at the Administrative office and approved by the Quality Assurance Supervisor prior to loading the data into the MAS 90 Accounts Receivable module via Visual Integrator software.

FACTS has an established information management and performance improvement system to measure and collect data to evaluate its performance in achieving the desired outcomes. FACTS performance measure outcomes chart specific to services to the County of Fresno are detailed on Addendum 18 on page 268.

FACTS also tracks information about participant characteristics to assist in developing and modifying services. Information is also collected with regards to what improvements to assessment services are needed. FACTS has developed methods for collecting and compiling data that ensures that the integrity of this system is maintained. FACTS produces a bi-annual Satisfaction Feedback Report reflecting feedback from participants (Addendum 10, page 236) and from Job Specialists (Addendum 11, page 248) that summarizes and analyzes the data for trends in areas needing improvement. The information in these reports is used to guide decision-making processes. Outcomes information is made available in an understandable manner and is regularly shared with the persons receiving services and other stakeholders, both internal and external to FACTS. The system is reviewed and modified as necessary to ensure its relevancy to FACTS and the services provided. Overall time allocated for documentation for all of the above equates to approximately five hours per participant.

### 3. DOCUMENTATION AND RECORD KEEPING *Describe your agency's ability to maintain and secure confidential records, collect data consistently, and track qualitative and quantitative outcomes.*

FACTS requires that different types of data be retained for specific periods of time to preserve its history, comply with audit or regulatory standards, and optimize its own systems and business practices. In order to safeguard the information stored on its networks, FACTS follows specific guidelines for network administration and management of user activity. FACTS Network and Computer Security Policy outlines these guidelines as well as the rules employees must follow when working on FACTS networks. This policy also includes administrative rules for retention of data and disaster recovery plan. FACTS shall maintain active and complete financial records of all activities and operations relating to all contracts and vendors in accordance with generally accepted accounting principles. FACTS shall also maintain accurate and complete employment and other records relating to performance of all business activity. FACTS will abide by all timeframes and documentation, and records will be kept according to written policies and procedures per each individual county/state requirement. FACTS abides by the following:

Administrative (data is stored on the Electronic and/or Paper Media)

- General and specific accounting – electronic, retain on a permanent basis; paper, retain current year plus seven (7) years.
- Budget, payroll and personnel – electronic, retain on a permanent basis; paper, retain current year plus seven (7) years.
- Contracts and miscellaneous – electronic and paper, retain on a permanent basis.
- MAS90 General Ledger records and accompanying journals are active since 2002, and electronic data is kept on a permanent basis since that date.

### Contracted/Vendorized Data

- Electronic data is retained on a permanent basis. Paper data is retained on a permanent basis as long as contract is active. All paper data shall be retained during the term of the contract and for a period of five (5) years thereafter unless written permission is given to dispose of any such material prior to such time.

For both Administrative and Contracted/Vendorized Data, safe disposal of old equipment is essential. Upon retirement, devices that store client identifiable information are sanitized to Department of Defense standards and disposed of legally. Regarding participant data security protocols, all FACTS staff attends state sponsored Privacy Training sessions, which document storing of files, safeguarding personal data (including test scores), privacy of interview rooms, what type of discussion is allowed during interviews, and sending of reports via approved methods. Storage of information on the cloud meets HIPAA standards, and files are stored for the mandated number of years designated by the state for CalWORKs WTW participants.

Regarding tracking qualitative and quantitative outcomes, FACTS Performance Measure Outcomes Chart specific to services for the County of Fresno are detailed on Addendum 18 on page 268.

### 3. DOCUMENTATION AND RECORD KEEPING *Describe your agency's planned method to securely provide DSS with monthly activity reports, monthly invoices, and participant assessment reports. Include how often reports will be provided.*

FACTS has regularly, since the initiation of this contract, provided monthly activity reports (MAR), monthly invoices and participant assessment reports within all County mandated timeframes. Monthly activity reports include two types of statistical referral and attendance information in addition to monthly Non-English Non-Spanish (NENS) total referral data. The below noted reports are submitted within five business days of the end of each month. A copy of the current reports are attached as Addendum 17, page 261. As noted, two reports include the following data:

- Monthly and Total Fiscal Year to Date Referral and Attendance Report: Delineates location of referral, type of referral, number of participants assessed, number of participant's referral, location of no-shows, and a specification of learning disability findings (learning disabled, intellectually disabled or neither). Additionally, this report provides data regarding total numbers and percentages. This report has especially assisted in comparing monthly tallies, diminishing no-show attendance, and identifying which location has sent the most referrals (may require additional scheduled service dates);
- Monthly and Total Fiscal Year to Date Limited English Proficiency (LEP) Non-English Non-Spanish (NENS) Report: Delineates the primary language of each referred LEP participant, the monthly tallies per language and the overall year to date totals for each language. This report has especially assisted in comparing language requirements as so to allow FACTS to provide testing in languages most beneficial to the County. This report has confirmed the need for bilingual (English/Spanish) evaluators, assessors and test technicians within the County of Fresno.

FACTS invoices the County of Fresno on a monthly basis in arrears by the tenth (10<sup>th</sup>) of each month for expenditures incurred to provide services. Invoices include all corresponding documentation submitted including but not limited to receipts, invoices received and documented administrative/overhead costs. Invoices are securely emailed to [DSSInvoices@fresnocountyca.gov](mailto:DSSInvoices@fresnocountyca.gov) with a CC to the DSS Contract Analyst. FACTS receives a secure email notice from the County that the invoice has been received and will be processed as soon as possible. If there are questions or concerns from the Contract Analyst regarding the

invoice, FACTS staff is immediately available to assist with questions and/or revise monthly invoicing as necessary.

FACTS acknowledges that the overall purpose of the Limited English Proficiency Assessment (LEP), Learning Disabilities Evaluations (LDE) and Independent Assessments (IA) is to provide objective evaluation results in a comprehensive evaluation report format to the Job Specialist for utilization in the development of the WTW employment plan. Regarding participant assessment/evaluation reports, FACTS can also provide DSS the WTW Plan in addition to the completed assessment/evaluation report when requested. FACTS will generate the assessment/evaluation reports within five business days following the completion of the assessment, rather than the requested ten days in the RFP. Reports are securely emailed to [DSSWTWSpecializedAssessments@fresnocountyca.gov](mailto:DSSWTWSpecializedAssessments@fresnocountyca.gov) on a daily basis.

*c. When reports or other documentation are to be a part of the proposal, a sample of each must be submitted. Reports should be referenced in this section and submitted in a separate section entitled "REPORTS."*

Report samples are included in Addendum 1 titled "REPORTS" pages 67 to 79. Contents of the Independent Assessment Report specifically address the referred WTW employment plan, rationale for changing/maintaining the WTW plan and specific and objective test scores upholding recommendations. Additionally, the contents of the Limited English Proficiency Assessment Report is detailed on pages 43-44, the contents of the Learning Disability Evaluation Report is detailed on page 49-50. A sample of the Limited English Proficiency Assessment Report is included as Addendum 1a, page 67. A sample of the Learning Disability Evaluation Report is included as Addendum 1b, page 71. A sample of the Independent Assessment Report is included as Addendum 1c, page 79.

*d. A complete description of any alternative solutions or approaches to accomplishing the desired results.*

As the current provider, we have learned the value of working on a flexible schedule with the County of Fresno to better serve participants. We have switched our scheduling, at County request, approximately three times per year to better meet the needs of the participants we serve. For example, we have added afternoon sessions, changed rural district scheduling to better accommodate the greatest number of participants and have added flexibility to the LEP versus the LDE scheduling when there is an influx of a refugee population, etc. The County of Fresno has made great strides with our company regarding open communication and willingness to make the best use of the services we provide. We regularly meet with program and contract management staff and attend quarterly contract meetings to review this flexible schedule, modify it when needed and adjust to any ebbs and flows the County may find regarding intake of participants. This open communication has worked extremely well, and we look forward to our continued flexibility in order to assist the County with any performance measures they may require.

Regarding desired results of the assessment and evaluation, FACTS ensures the participant has made an informed choice of employment goals jointly with the Evaluator following a discussion of the assessment test results and the participant's vocational interests. Participants will review not only the Fresno County Demand List, but the Demand Jobs Summary, which contains information on the Fresno County employment outlook, wage levels, reading and math requirements, specific vocational preparation required, and working conditions for each job listed. This provides assurance of an informed choice for each employment goal selected.

Additionally, FACTS offers **free follow-up service** within one year of the original assessment for Job Specialists when participants want to change WTW employment goals or Job Specialists have vocational considerations, which may need to be explored. FACTS always offer follow-up addendums to our reports when employment goals change and the original assessment report no longer supports the foundation of the

WTW plan. Generally, the FACTS process of assessment and report is of great assistance to Job Specialists, as it sets the stage for a straightforward implementation of the WTW plan, (as the Evaluator has taken the lead in providing career guidance and counseling to the participant). We also act within a team framework, conducting exit conferences jointly with the Job Specialist and participant when the Job Specialist feels it would be of benefit with particularly difficult or hard to serve participants. This process greatly diminishes the need for use of the grievance procedure or independent assessments.

As noted in the initial stages of this RFP, FACTS is recognized as an unbiased provider of assessment and evaluation services, and is in a unique position to provide the following:

- ✓ objective assessment and evaluation;
- ✓ multiple assessment tools, work samples, and online testing instruments;
- ✓ a wealth of experience, including staff with the following status:
  - Certified Vocational Evaluator (C.V.E.)
  - International Certified Vocational Evaluator (I.C.V.E.)
  - Professional Vocational Evaluator (P.V.E.)
  - Diplomate, American Board of Vocational Experts (A.B.V.E.)
  - International Psychometric Evaluation Certification (I.P.E.C)
- ✓ FACTS maintains Commission on Accreditation of Rehabilitation Facilities (CARF) status;
- ✓ FACTS maintains an extremely good rapport with the County of Fresno;
- ✓ FACTS provides an annual Demand Occupation Job List for the County of Fresno;
- ✓ FACTS is able to provide all assessment reports to the County of Fresno within a five-business day window rather than the requested ten business days;
- ✓ FACTS is able to provide any informational trainings requested by the County of Fresno including DSS staff and department contracted staff training, job readiness (JobWISE) participant training, and client orientation videos;
- ✓ FACTS provides quarterly training for both its assessment/evaluation staff;
- ✓ FACTS gathers feedback from both the Job Specialist and the participant;
- ✓ FACTS publishes this feedback to the County of Fresno at no charge;
- ✓ FACTS Fresno assessment center centrally located within the metro Fresno provides full ADA access and numerous work samples, allowing a unique simulated work environment, allowing observation and documentation of CalWORKs participants work readiness skills;
- ✓ FACTS provides numerous occupational information sources for perusal of the local labor market, including internet access to EDD, O\*NET, the Occupational Outlook Handbook, Bureau of Labor Statistics and other up to date printed materials detailing available employment opportunities;
- ✓ FACTS is currently the largest provider of assessment and evaluation services in the state;
- ✓ FACTS has extensive experience with Limited English Proficiency (LEP) populations;
- ✓ FACTS is the largest provider of assessment/evaluation services to CalWORKs, Department of Labor and the Department of Rehabilitation within the state of California;
- ✓ FACTS learning disability evaluations reports are extensive and thorough enough to be utilized by the CalWORKs program to transfer responsibility to the Social Security Administration (SSA) for eligible participants that are deemed unable to work; and
- ✓ FACTSTRACK SOFTWARE - FACTS has developed our own unique proprietary software, called "FACTSTRACK" which is able to accurately capture a multitude of information necessary for the County.

In summary, FACTS is and continues to be open to any alternative solutions or approaches to accomplishing the desired results. We have worked well with the County of Fresno since 2016, and look forward to providing professional evaluation and assessment service to all participants referred.

## Exhibit A: Cost Proposal

Bidder or Company Name:

Foster Assessment Center & Testing Service, Inc. (FACTS)

**Reminder:** As stated in the cost proposal requirements of this RFP, both Sections I and II must be completed.

**Section I: Proposed Cost Per Instance of Service -** The fees below should cover your agency's operational costs for the services. Underlined quantities can be guaranteed. Italicized quantities are estimates based on current trends, and actual quantities may be higher or lower.

Fee-for-Service Items 7-9 are desired, but optional. If your agency prefers to not offer the service, please enter the price as \$0.00 and explain in the budget narrative in Section II below.

Fee-for-Service Proposed Rates by Service	Est. Qty. Needed per 12 Months (actual demand will fluctuate)	Term 1 (18 months) January 1, 2023 – June 30, 2024	Optional Term 2 (12 months) July 1, 2024 – June 30, 2025	Optional Term 3 (12 months) July 1, 2025 – June 30, 2026	Optional Term 4 (12 months) July 1, 2026 – June 30, 2027
		Cost per Service	Cost per Service	Cost per Service	Cost per Service
1. Limited English Proficiency (LEP) Report	<u>75</u>	\$ 915.00	\$ 960.00	\$ 1,010.00	\$ 1,060.00
2. Learning Disability Evaluation (LDE) Report	<u>65</u>	\$ 1,595.00	\$ 1,675.00	\$ 1,760.00	\$ 1,848.00
3. Independent Assessment (Third Party Review) Report	<u>2</u>	\$ 500.00	\$ 525.00	\$ 550.00	\$ 575.00
4. Interpreter Services (per minute rate)	<i>1,600</i>	\$ 1.50	\$ 1.60	\$ 1.70	\$ 1.80
5. Monthly Activities: Prepare Monthly Invoice/Reports, Ongoing Communication with DSS (limit 12 per year)	<u>12</u>	\$ 2,300.00	\$ 2,415.00	\$ 2,535.00	\$ 2,660.00
6. No-Shows/Cancellations (zero cost preferred)	<u>120</u>	\$ 325.00	\$ 345.00	\$ 365.00	\$ 385.00
7. Produce New or Update WTW Client Orientation Video	<u>1</u>	\$ 2,000.00	\$ 2,100.00	\$ 2,200.00	\$ 2,300.00
8. Informational Training Presentations for DSS Staff	<u>5</u>	\$ 3,000.00	\$ 3,150.00	\$ 3,300.00	\$ 3,465.00
9. JobWISE Presentations	<u>24</u>	\$ 2,000.00	\$ 2,100.00	\$ 2,200.00	\$ 2,310.00
<b>ESTIMATED TERM COST (for comparison purposes only)</b>		\$ 460,950.00	\$ 323,115.00	\$ 339,690.00	\$ 356,835.00
<b>EST. ACCUMULATED TOTAL COST (INCLUDING OPTIONAL TERMS) (for comparison purposes only)</b>		\$ 460,950.00	\$ 784,065.00	\$ 1,123,755.00	\$ 1,480,590.00

It should be noted that the volume of referrals significantly impacts the cost effectiveness of the program. Dividing the referrals between a number of agencies in Fresno County will not allow for the most cost-effective use of facilities, testing equipment, or staff personnel. This contract bid pricing is only valid when the entire scope of all services (Limited English Proficiency and Learning Disability Evaluation) listed is awarded solely to FACTS.

## Exhibit A: Cost Proposal

**Bidder or Company Name:**

Foster Assessment Center & Testing Service, Inc. (FACTS)

**Section II. Budget Narrative - Include a brief narrative that explains and justifies the cost per instance of service and any price increases.**

- |   |
|---|
| <p>1. Limited English Proficiency (LEP) Report: Cost per LEP report includes staff salaries, benefits, payroll taxes, insurance, communications (including but not limited to telephone, postage, email, microsoft software FACTS website, internet), office expenses (including but not limited to rent, utilities, janitorial, office equipment maintenance, service contracts, licensing fees, security system, database software updates, accounting); equipment (including but not limited to computers, photocopier/fax/scanner), transportation; program supplies (including but not limited to psychometric testing and office supplies), and indirect costs.</p>           |
| <p>2. Learning Disability Evaluation (LDE) Report: Cost per LDE report includes staff salaries benefits, payroll taxes insurance, communications (including but not limited to telephone, postage, email, microsoft software, FACTS website, internet); office expenses (including but not limited to rent, utilities janitorial, office equipment maintenance, service contracts, licensing fees, security system, database software updates, accounting); equipment (including but not limited to computers, photocopier/fax/scanner); transportation; program supplies (including but not limited to psychometric testing and office supplies); and indirect costs.</p>          |
| <p>3. Independent Assessment (Third Party Review) Report: Cost per IA report includes staff salaries, benefits, payroll taxes, insurance, communications (including but not limited to telephone, postage, email, microsoft software, FACTS website, internet); office expenses (including but not limited to rent, utilities, janitorial, office equipment maintenance, service contracts, licensing fees, security system, database software updates, accounting); equipment (including but not limited to computers, photocopier/fax/scanner); transportation; program supplies (including but not limited to psychometric testing and office supplies); and indirect costs.</p> |
| <p>4. Interpreter Services (per minute rate): FACTS utilizes interpretation services for all non-English non-Spanish (NENS) participants, as FACTS staff are bilingual in English/Spanish. Interpretation charges are typically \$1.50 per minute and costs fluctuate depending on the number of NENS referred, translation provider (typically Telelanguage depending on availability) and the participant's amount of English proficiency. Participants less proficient will require more minutes of interpretation services. Additionally Telelanguage provides written translation services for FACTS documents, when requested by Fresno County DSS.</p>                       |
| <p>5. Monthly Activities (reimbursement is limited to 1 instance of service per month) - Prepare Monthly Invoice/Monthly Activity Reports (MAR) and maintain ongoing communication with DSS including quarterly contract meetings, phone calls, and emails pertaining to service delivery, invoicing, contract compliance and monthly activity reports: Costs include staff salaries including accounting staff, CPA quarterly financial review and services, communication costs, auditing costs (if applicable), quarterly/annual allocations and indirect costs. With DSS staff changes the above is duplicated, and/or modified, requiring increased time and costs</p>         |
| <p>6. No-Shows/Cancellations (zero cost preferred): Costs include, but are not limited to, obtaining referral form; phone/email correspondence with the referring Job Specialist and client regarding attendance and answering any questions regarding the assessment/evaluation (typically 6 times or until client is contacted); scheduling of staff; sending confirmation letters; emailing liaison daily attendance roster listing no-shows, updating MAR with attendance; CPA quarterly and annual fees associated with the above costs. Maintenance of annual fixed costs (i.e rental space, insurance, etc.) that must be paid regardless of attendance.</p>                 |
| <p>7. Produce New or Update WTW Client Orientation Video: Costs associated with producing a new or updated Fresno County DSS WTW client orientation video include, but are not limited to staff salaries, video production team, transportation and lodging for Quality Assurance Supervisor and Director of Services, camera and filming equipment, audio/microphone devices, lighting, computer/editing equipment, office expenses, high speed internet, email, microsoft software, communication and revisions with Fresno County DSS staff, etc.</p>  |
| <p>8. Informational Training Presentations for DSS Staff: Costs associated with providing informational in-person training sessions for Fresno County DSS staff and Fresno County DSS contracted partners include, but are not limited to staff salaries, office expenses, transportation and lodging for Quality Assurance Supervisor and Director of Services, catering, computer, projector, presentation materials, etc. Costs associated with providing informational virtual training sessions including but not limited to computer equipment, web camera, high speed internet, video conferencing annual subscription, antivirus software, staff salaries, etc.</p>         |

## Exhibit A: Cost Proposal

**Bidder or Company Name:**

Foster Assessment Center & Testing Service, Inc. (FACTS)

9. JobWISE Presentations: Costs associated with the providing informational virtual training presentations for Fresno County DSS job readiness (JobWISE) participants include, but are not limited to preparation of informational training materials, computer equipment, email, microsoft software, web camera, high speed internet, video conferencing annual subscription, antivirus software,communications, and staff salary for the entire project and presentation.

**It should be noted that the volume of referrals significantly impacts the cost effectiveness of the program. Dividing the referrals between a number of agencies in Fresno County will not allow for the most cost-effective use of facilities, testing equipment, or staff personnel. This contract bid pricing is only valid when the entire scope of all services (Limited English Proficiency and Learning Disability Evaluation) listed is awarded solely to FACTS.**

## **CHECK LIST**

This Checklist is provided to assist vendors in the preparation of their RFP response. Included are important requirements the bidder is responsible to submit with the RFP package in order to make the RFP compliant.

Check off each of the following (if applicable):

- ✓ 1. Signed cover page of Request for Proposal (RFP).
- ✓ 2. Check <http://www.FresnoCountyCA.gov/departments/internal-services/purchasing/bid-opportunities> for any addenda.
- ✓ 3. Signed cover page of each Addendum.
- ✓ 4. Provide a Conflict of Interest Statement.
- ✓ 5. Signed Trade Secret Form as provided with this RFP (Trade Secret Information, if provided, must be electronically submitted in a separate PDF file and marked as Confidential).
- ✓ 6. Signed Criminal History Disclosure Form as provided with this RFP.
- ✓ 7. Signed Participation Form as provided with this RFP.
- ✓ 8. The completed Reference List as provided with this RFP.
- ✓ 9. Indicate all of bidder exceptions to the County's requirements, conditions and specifications as stated within this RFP.
- ✓ 10. Bidder's proposal, in PDF format, electronically submitted to the Bid Page on Public Purchase.

**Return Checklist with your RFP response**

**Addendum 1a – Sample Report Limited English Proficiency**

**Foster Assessment Center & Testing Service, Inc.  
 Limited English Proficiency Assessment  
 Fresno County Department of Social Services**

**SECTION 1: PARTICIPANT INFORMATION**

<b>Participant:</b> John Doe	<b>Employment Services Case Manager:</b> Ms. Job Specialist
<b>Case #:</b> #####	<b>Assessor:</b> Esmeralda Apresa, M.A.
<b>Primary Language:</b> Spanish	<b>Date(s) of Attendance:</b> 8/15/2022
<b>Referring Office:</b> Fresno County - DSS	<b>Assessment Site:</b> Foster Assessment Center & Testing Service, Inc. (FACTS) Fresno, CA

**SECTION 2: PARTICIPANT BACKGROUND**

The participant reported, “I had two surgeries in my right forearm. I can’t use my right hand to write or do anything. I can probably lift three to four pounds with my right hand. I take Ibuprofen for the pain when needed. I sometimes get frustrated because I can’t do regular daily activities.” Mr. John Doe also stated, “I received a misdemeanor for domestic violence in 2016. I paid fines and completed a 12-month domestic violence program here in Fresno.” He further indicated, “My driver’s license got suspended. I am not in the process of getting it back yet.” The participant did not indicate the need for childcare, or transportation assistance.

<b>Education/Training Reported</b>	<b>School Name (Location)</b>	<b>Area of Study</b>	<b>Grade Completed or Degree/Certification</b>	<b>Date Completed</b>
High School	Clovis (Clovis, CA)	General Studies	9 <sup>th</sup> grade (Departed in 1993)	Did not complete; “I got expelled and I started working”

<b>Work History Reported Job Title (Name of Employer)</b>	<b>Length/Years of Employment</b>	<b>Reason for Leaving</b>
Machine Operator (Vita Pakt)	Two years (2018-2020)	“I got injured”
Lead Person (Cargill)	10 years (2008-2018)	“I was laid off”

<b>Reported Transferable Skills:</b>
<ul style="list-style-type: none"> <li>▪ Material handling</li> <li>▪ Equipment operation/driving</li> <li>▪ Supervising</li> <li>▪ Loading/unloading trucks</li> <li>▪ Inventory</li> </ul>

### SECTION 3: JOB READINESS SKILLS (OBJECTIVELY BASED)

Yes	No		Yes	No	
X		Appropriately Dressed		X	Appropriate Work Pace
X		Expresses Self Clearly	X		Positive Attitude/Cooperative
X		Self-Confident	X		Completes Tasks Effectively
	X	Works Effectively Under Pressure	X		Appropriate Interpersonal Relations
X		Punctuality	X		Ability To Make a Career Decision

Comments: It should be noted that the participant demonstrated difficulty working under pressure (below average quality scores) and difficulty with work pace (below average time scores) when reviewing assessment results. This categorization is an objectively based indicator (rather than the participant's self-perception of their ability to work under pressure).

### SECTION 4: AREAS OF STRENGTHS AND LIMITATIONS/BARRIERS

<p><b>Areas of Strengths:</b></p> <ul style="list-style-type: none"> <li>▪ Reported previous work history</li> <li>▪ Reported past transferable skills</li> <li>▪ Willingly accepted all tasks requested</li> <li>▪ Arrived to the evaluation on time</li> <li>▪ Reported being bilingual (English/Spanish)</li> </ul>
--

<b>Limitations/Employment Barriers:</b>	<b>Recommendations:</b>
<input checked="" type="checkbox"/> Academic/Achievement Limitations	▪ Remedial education in English reading comprehension and math skills
<input type="checkbox"/> Adult Literacy	▪ N/A
<input type="checkbox"/> Child Care Issues	▪ N/A
<input checked="" type="checkbox"/> HSE Requirements	▪ Adult Basic Education – coursework to prepare for HSE exam
<input type="checkbox"/> Housing/Shelter Issues	▪ N/A
<input checked="" type="checkbox"/> Legal Issues	▪ Peruse the legal record prior to selecting the Employment Goal in order to ascertain eligibility for hiring
<input checked="" type="checkbox"/> Limited English Proficiency	▪ The participant demonstrated limited English skills. ESL coursework via Clovis Adult School is recommended to increase his future employability.
<input type="checkbox"/> Limited Work History	▪ N/A
<input checked="" type="checkbox"/> Medical Issues	▪ Medical follow-up as needed
<input type="checkbox"/> Mental Health Issues	▪ N/A
<input type="checkbox"/> Outdated Skills	▪ N/A
<input checked="" type="checkbox"/> Transportation Issues	▪ Indicated a suspended driver's license.
<input checked="" type="checkbox"/> Work Product and/or Work Pace	▪ Hands-on training or instructions which may facilitate learning ▪ Simple and/or repeated instructions
<input checked="" type="checkbox"/> Physical Issues	▪ Medical follow-up as needed

## SECTION 5: TEST RESULTS

### APTITUDE/COGNITIVE/ASSESSMENT TEST RESULTS AND INTERPRETATION

BASIC ACADEMIC SKILLS	Test Name & Level Administered	Grade Level
Spanish Reading Comprehension	Tests of Adult Basic Education Español- Easy	2.7
Spanish Math Computation	Tests of Adult Basic Education Español- Easy	5.6
English Reading Comprehension	Gates-MacGinitie Reading Test -- Level 2	4.1

INTELLECTUAL/COGNITIVE/LEARNING PROFILE		Percentile
NON-VERBAL INTELLIGENCE TONI-4	Toni Index = 87	19 <sup>th</sup>

OCCUPATIONAL APTITUDES (Test/Instrument Utilized)
<b>Above Average:</b> <ul style="list-style-type: none"> <li>▪ N/A</li> </ul>
<b>Average:</b> <ul style="list-style-type: none"> <li>▪ N/A</li> </ul>
<b>Below Average:</b> <ul style="list-style-type: none"> <li>▪ Spanish reading comprehension</li> <li>▪ Spanish math computation</li> <li>▪ English reading comprehension</li> <li>▪ Non-verbal intelligence</li> </ul>

INVENTORY PROFILES - Interest
<b>Occupations of Highest Interest</b> (Fresno County Demand Occupations List): <ul style="list-style-type: none"> <li>▪ Office Helper (Assistant)</li> <li>▪ Heat, Air Conditioning &amp; Refrigeration Mechanic</li> </ul>
<b>Read Free Vocational Interest Inventory:</b> This interest questionnaire is a non-verbal interest inventory that attempts to identify the individual's vocational interest by pictorial display. <ul style="list-style-type: none"> <li>▪ The individual indicated a <b>higher degree of interest</b> in the following <b>fields</b>: Clerical, Animal Care, Materials Handling</li> <li>▪ The individual indicated an <b>average degree of interest</b> in the following <b>fields</b>: Automotive, Building Trades, Food Service, Patient Care, Horticulture, Housekeeping, Personal Service, Laundry Service</li> <li>▪ The individual indicated a <b>lower degree of interest</b> in the following <b>fields</b>: N/A</li> </ul>

## SECTION 6: EMPLOYMENT GOALS

JOB OF INTEREST
Several jobs of interest were discussed with the participant (see Job Interest Sheet and OCAT ASR). This Assessor discussed them with the participant. In determining the below listed employment goal, this Assessor considered the interests of the participant, academic ability, work history, current local labor market information, the participant's personal job preference and any known barriers to employment, including legal and health issues. Upon discussion, the participant chose the below listed employment goal as the current employment goal at this time.
LABOR MARKET INFORMATION
According to the current U.S. Department of Labor's Bureau of Labor Statistics Occupational Outlook Handbook, employment for Office Helper (Assistant) is projected to grow 5 percent from 2016 to 2026.

<b>Primary Employment Goal:</b> Office Helper (Assistant)		O*NET#: 43-5021
Recommended Activities (in recommended order)	<ul style="list-style-type: none"> <li>▪ ESL courses</li> <li>▪ Remediate English to the 6<sup>th</sup> grade</li> <li>▪ Remediate Math to the 6<sup>th</sup> grade</li> <li>▪ Enrollment in HSE preparation towards Certificate of High School Equivalency</li> <li>▪ Vocational training</li> <li>▪ Job search/Job club</li> <li>▪ Work experience</li> </ul>	

<b>Factors Supporting the Selection of the Primary Employment Goal:</b>															
Yes	No		Yes	No											
X		Vocational Interest/Preference	X		Availability of Jobs (on Demand List)										
	X	Sufficient Academics Skills/Aptitudes	X		Motivation										
	X	Work History/Prior Training		X	Education Competency/History										
X		Temperament	X		Work Values										
<table border="1" style="width: 100%;"> <tr> <td>Fresno Adult School Reading Recommended Level</td> <td>Grade Level : 6.0</td> </tr> <tr> <td>English Reading Participant Demonstrated</td> <td>Grade Level : 4.1</td> </tr> <tr> <td>Spanish Reading Participant Demonstrated</td> <td>Grade Level : 2.7</td> </tr> <tr> <td>Fresno Adult School Math Recommended Level</td> <td>Grade Level : 6.0</td> </tr> <tr> <td>Math Participant Demonstrated</td> <td>Grade Level : 5.6</td> </tr> </table>						Fresno Adult School Reading Recommended Level	Grade Level : 6.0	English Reading Participant Demonstrated	Grade Level : 4.1	Spanish Reading Participant Demonstrated	Grade Level : 2.7	Fresno Adult School Math Recommended Level	Grade Level : 6.0	Math Participant Demonstrated	Grade Level : 5.6
Fresno Adult School Reading Recommended Level	Grade Level : 6.0														
English Reading Participant Demonstrated	Grade Level : 4.1														
Spanish Reading Participant Demonstrated	Grade Level : 2.7														
Fresno Adult School Math Recommended Level	Grade Level : 6.0														
Math Participant Demonstrated	Grade Level : 5.6														
<b>Comments:</b>															
<p>The participant reported an interest in the occupation of Office Helper (Assistant). Demonstrated reading and math skills were deficient of the recommended levels for this occupation. Remedial education at Clovis Adult School to improve reading and math skills is recommended to make him more employable in this occupation. Furthermore, it is also recommended he complete a Certificate of High School Equivalency at Clovis Adult School. Since the participant reported a desire to improve his overall English skills, it is further recommended he also pursue ESL coursework at Clovis Adult School. Lastly, it is recommended Mr. John Doe obtain a certificate of completion from the Professional Office Assistant Training Program at Fresno Adult School.</p> <p>*It should be noted that the participant reported medical/physical issues. Therefore, it is recommended the participant follow up with his medical provider prior to selecting an employment goal.</p> <p>**Recommended EDD reading level for this occupation is 4.0 and entry math is 4.0. It is strongly recommended that the participant meet the highest recommended level of training prior to pursuing this goal.</p>															

Thank you for referring this participant to Foster Assessment Center & Testing Service, Inc. We ensure the quality of our work by providing free follow-up service. If you have other questions concerning alternate employment options, specific details of participation, further analysis or test results or need further test administration, please do not hesitate to call. We will be glad to be of further assistance.

Assessor Signature \_\_\_\_\_ Date: 08/16/2022  
*Esmeralda Apresa, M.A.*

Foster Assessment Center & Testing Service, 2350 West Shaw Avenue, Suite #118, Fresno, CA, 93711  
 Phone (559) 721-7488 Fax (559) 721-7589 [EsmeraldaApresa@FosterAssessment.com](mailto:EsmeraldaApresa@FosterAssessment.com)

Attachments: Test Results; Employment Services Case Manager Feedback Form.

**Foster Assessment Center & Testing Service, Inc.  
Learning Disability Evaluation  
Fresno County Department of Social Services**

**SECTION 1: PARTICIPANT INFORMATION**

<b>Participant:</b>	Sample Participant	<b>Job Specialist:</b>	Sample Job Specialist
<b>Case Number:</b>	B101010	<b>Evaluator:</b>	Esmeralda Apresa, M.A.
<b>Primary Language:</b>	English		
<b>Referring Office:</b>	Fresno County - DSS	<b>Assessment Site:</b>	Foster Assessment Center & Testing Service, Inc. (FACTS) Fresno, CA
<b>Dates of Attendance:</b>	8/3/2022		

**SECTION 2: PARTICIPANT BACKGROUND**

The participant reported, “I have problems with reading, math, concentration, taking tests, studying skills, organizing written work, completing assignments, memory, motivation, understanding things, and self-confidence when it comes to school.” Additionally, Ms. Participant stated, “When I was in elementary school, I was told I had a learning disability. I also had an IEP (Individualized Educational Plan) since I was in elementary school.” Furthermore, she reported, “When I need to learn new information, I need someone to explain it to me clearly and then show me how to do it.” Moreover, the participant indicated, “I have always found it really difficult to be in a standard classroom setting because I am not given enough time to complete my work or to learn new information.” Additionally, the participant indicated, “My mom and my son have learning disabilities. Therefore, I know I may have some issues with my learning.”

Regarding mental health problems, the participant stated, “I started seeing a mental health professional this year to help with depression, and bipolar disorder.” Additionally, she stated, “I take Strattera for ADHD (Attention Deficit Hyperactivity Disorder) as needed. I usually only take it if I need to focus or if I am going to school.”

Regarding substance abuse, Ms. Participant reported, “I used Methamphetamine on and off for about five years. I began when I was 24 years old and stopped when I was 29. I attended an inpatient rehabilitation program in 2012 and I have been clean for 10 years now.”

The participant indicated the need for childcare assistance. However, she did not report the need for transportation assistance. She also stated that she had a clean legal background.

<b>Education/Training Reported</b>	<b>School Name (Location)</b>	<b>Area of Study</b>	<b>Grade Completed or Degree/Certification</b>	<b>Date Completed</b>
High School	Hoover High (Fresno, CA)	General Studies	10 <sup>th</sup> grade (Departed in 2001)	Did not complete; “I got pregnant.”
Adult School	Cesar Chavez (Fresno, CA)	General Studies	Two weeks (Departed in 20108)	Did not complete; “School was hard and the teacher was not providing extra help.”

Work History Reported Job Title (Name of Employer)	Length/Years of Employment	Reason for Leaving
Caregiver (Kalos)	Two weeks (2022)	"Lack of childcare."
Caregiver (Assist Inc.)	Eight months (2018)	"I was not given enough hours."
Receptionist (International Services)	One year (20011)	"The company was not paying me."

<b>Reported Transferable Skills:</b>
<ul style="list-style-type: none"> <li>▪ Clerical</li> <li>▪ Patient care</li> </ul>

**SECTION 3: JOB READINESS SKILLS (OBJECTIVELY BASED)**

Yes	No		Yes	No	
X		Appropriately Dressed		X	Appropriate Work Pace
X		Expresses Self Clearly	X		Positive Attitude/Cooperative
	X	Self-Confident	X		Completes Tasks Effectively
	X	Works Effectively Under Pressure	X		Appropriate Interpersonal Relations
X		Punctuality	X		Ability To Make a Career Decision

Comments: It should be noted that the participant demonstrated difficulty working under pressure (below average quality scores) and difficulty with work pace (below average time scores) when reviewing assessment results. This categorization is an objectively based indicator (rather than the participant's self-perception of their ability to work under pressure). As stated on page 1, the participant reported problems with self-confidence when it came to school.

**SECTION 4: AREAS OF STRENGTHS, TRAINING/EMPLOYMENT DEFICITS, AND LIMITATIONS/BARRIERS**

<b>Areas of Strengths:</b>
<ul style="list-style-type: none"> <li>▪ Reported previous work history</li> <li>▪ Reported past transferable skills</li> <li>▪ Willingly accepted all tasks requested</li> <li>▪ Arrived to the evaluation on time</li> <li>▪ Spelling achievement</li> <li>▪ Non-verbal intelligence</li> <li>▪ Brief intellectual ability</li> <li>▪ General intellectual ability</li> </ul>

<b>Training and/or Employment Deficits</b> were identified in the following areas:
<ul style="list-style-type: none"> <li>▪ Reported mental health issues</li> <li>▪ Reported not having a HSD/GED</li> <li>▪ Reported previous substance abuse</li> <li>▪ Reading comprehension</li> <li>▪ Math achievement</li> <li>▪ Perceptual speed</li> <li>▪ Oral vocabulary</li> <li>▪ Number series</li> <li>▪ Verbal attention</li> <li>▪ Letter-pattern matching</li> <li>▪ Number pattern matching</li> <li>▪ Math calculation skills</li> <li>▪ Academic fluency</li> <li>▪ Letter-word identification</li> <li>▪ Calculation</li> </ul>

- Sentence reading fluency
- Math facts fluency
- Sentence writing fluency

<b>Limitations/Employment Barriers:</b>	<b>Recommendations:</b>
<input checked="" type="checkbox"/> Academic/Achievement Limitations	<ul style="list-style-type: none"> <li>▪ Extra time on tests or quizzes;</li> <li>▪ Books on tape used in conjunction with printed text material;</li> <li>▪ Use of a note taker as needed;</li> <li>▪ Use of a tutor as needed;</li> <li>▪ Read instructions or questions on any tests needed;</li> <li>▪ Use of Grammar Check as necessary; and</li> <li>▪ Use of calculators.</li> </ul>
<input type="checkbox"/> Adult Literacy	▪ N/A
<input checked="" type="checkbox"/> Child Care Issues	▪ Childcare assistance as required
<input type="checkbox"/> Domestic Violence	▪ N/A
<input checked="" type="checkbox"/> HSE Requirements	▪ Adult Basic Education – coursework to prepare for HSE exam
<input type="checkbox"/> Housing/Shelter Issues	▪ N/A
<input type="checkbox"/> Legal Issues	▪ N/A
<input type="checkbox"/> Limited English Proficiency	▪ N/A
<input type="checkbox"/> Limited Work History	▪ N/A
<input type="checkbox"/> Medical Issues	▪ N/A
<input checked="" type="checkbox"/> Mental Health Issues	<ul style="list-style-type: none"> <li>▪ Mental health follow up as needed</li> <li>▪ Counseling as needed</li> </ul>
<input checked="" type="checkbox"/> Substance Abuse Issues	▪ Follow-up as needed
<input checked="" type="checkbox"/> Outdated Skills	▪ Update skills through training, certification and/or research
<input type="checkbox"/> Transportation Issues	▪ N/A
<input checked="" type="checkbox"/> Work Product and/or Work Pace	<ul style="list-style-type: none"> <li>▪ Hands-on training or instructions which may facilitate learning</li> <li>▪ Simple and/or repeated instructions</li> </ul>
<input type="checkbox"/> Physical Issues	▪ N/A

**SECTION 5: LEARNING DISABILITY IDENTIFICATION**

**Learning Disability Identified:**  Yes  No

The definition of a learning disability, according to the California Education Code is defined as a demonstration of one or more of the following conditions:

- low average to above average intellectual ability;
- severe processing deficit(s); and
- severe aptitude-achievement discrepancy(ies) and measured achievement in an instructional or employment setting.

<b>Cognitive Processing Demonstrated</b>	<b>Learning Disability Identified Within the Following Areas</b>
<input type="checkbox"/> Above Average	<input checked="" type="checkbox"/> Reading Comprehension
<input type="checkbox"/> High Average	<input type="checkbox"/> Spelling
<input checked="" type="checkbox"/> Average	<input checked="" type="checkbox"/> Arithmetic Computation
<input type="checkbox"/> Low Average	<input type="checkbox"/> Other

**Intellectual/Developmental Disability Identified:**  Yes  No

According to the *Diagnostic and Statistical Manual of Mental Disorders (DSM-5)*, an intellectual disability involves impairments of general mental abilities that impact adaptive functioning in three domains, or areas. These domains determine how well an individual copes with everyday tasks, and are as follows:

- The conceptual domain includes skills in language, reading, writing, math, reasoning, knowledge, and memory;
- The social domain refers to empathy, social judgment, interpersonal communication skills, the ability to make and retain friendships, and similar capacities; and
- The practical domain centers on self-management in areas such as personal care, job responsibilities, money management, recreation, and organizing school and work tasks.

While intellectual disability does not have a specific age requirement, an individual’s symptoms must begin during the developmental period and are diagnosed based on the severity of deficits in adaptive functioning. The disorder is considered chronic and often co-occurs with other mental conditions like depression, attention-deficit/hyperactivity disorder, and autism spectrum disorder.

## SECTION 6: ASSESSMENT TEST RESULTS AND INTERPRETATION

BASIC ACADEMIC SKILLS	Test Name & Level Administered	Grade Level
English Reading Comprehension	Gates-MacGinitie Reading Test – Level 6	3.7
Spelling Achievement	Wide Range Achievement Test 5	8.7
Math Achievement	Wide Range Achievement Test 5	3.8

WOODCOCK-JOHNSON CLUSTER SCORES	Grade Equivalent	Percentile	Standard Score
<b>Broad Math:</b> A comprehensive measure of math achievement, including problem solving and computational skills.	4.5	2 <sup>nd</sup>	70
<b>Academic Fluency:</b> An overall index of academic fluency.	4.5	3 <sup>rd</sup>	71

WOODCOCK-JOHNSON IV TESTS OF ACHIEVEMENT	Grade Equivalent	Percentile	Standard Score
<b>Letter/Word Identification:</b> Measures the individual’s ability to read isolated words aloud.	5.2	4 <sup>th</sup>	74
<b>Calculations:</b> Measures the individual’s ability to perform mathematical computations.	2.9	0.3 <sup>rd</sup>	60
<b>Sentence Reading Fluency:</b> Measures the individual’s ability to quickly read and comprehend sentences.	4.1	3 <sup>rd</sup>	71
<b>Math Facts Fluency:</b> Measures the individual’s ability to quickly solve simple addition, subtraction and multiplication problems.	6.8	17 <sup>th</sup>	86
<b>Sentence Writing Fluency:</b> Measures the individual’s fluency for quickly formulating and writing simple sentences.	2.5	0.3 <sup>rd</sup>	58

WOODCOCK-JOHNSON IV TESTS OF COGNITIVE ABILITY	Grade Equivalent	Standard Score	Percentile
<b>Oral Vocabulary:</b> A measure of an individual’s comprehension of words. A measure of acquired knowledge.	3.9	67	1 <sup>st</sup>
<b>Number Series:</b> A test of quantitative and inductive reasoning.	4.1	79	8 <sup>th</sup>

<b>Verbal Attention:</b> A test of short-term verbal working memory. This test taps attentional control, critical for efficient working memory.	2.6	66	1 <sup>st</sup>
<b>Letter-Pattern Matching:</b> Measures the speed at which the individual is able to make visual symbol discriminations among a series of letter patterns.	6.1	83	13 <sup>th</sup>
<b>Number-Pattern Matching:</b> A test of processing speed, specifically perceptual speed.	2.6	46	<0.1 <sup>st</sup>

<b>WOODCOCK-JOHNSON CLUSTER SCORES</b>	<b>Grade Equivalent</b>	<b>Percentile</b>	<b>Standar d Score</b>
<b>Perceptual Speed:</b> A measure of the ability to rapidly perform simple clerical tasks that use symbols, and is related to orthographic processing.	3.9	1 <sup>st</sup>	62

<b>INTELLECTUAL/COGNITIVE/LEARNING PROFILE</b>		<b>Percentile</b>
<b>GENERAL INTELLECTUAL ABILITY</b> BETA-4	BETA IQ = 98	45 <sup>th</sup>
<b>NON-VERBAL INTELLIGENCE</b> TONI-4	TONI Index = 94	34 <sup>th</sup>
<b>BRIEF INTELLECTUAL ABILITY</b> Woodcock Johnson	Standard Score = 97 Grade Level = 10.5	43 <sup>rd</sup>

<b>OCCUPATIONAL APTITUDES (Test/Instrument Utilized)</b>
<p><b>Average:</b></p> <ul style="list-style-type: none"> <li>▪ Spelling achievement</li> <li>▪ Non-verbal intelligence</li> <li>▪ Brief intellectual ability</li> <li>▪ General intellectual ability</li> </ul>
<p><b>Below Average:</b></p> <ul style="list-style-type: none"> <li>▪ Reading comprehension</li> <li>▪ Math achievement</li> <li>▪ Perceptual speed</li> <li>▪ Oral vocabulary</li> <li>▪ Number series</li> <li>▪ Verbal attention</li> <li>▪ Letter-pattern matching</li> <li>▪ Number pattern matching</li> <li>▪ Math calculation skills</li> <li>▪ Academic fluency</li> <li>▪ Letter-word identification</li> <li>▪ Calculation</li> <li>▪ Sentence reading fluency</li> <li>▪ Math facts fluency</li> <li>▪ Sentence writing fluency</li> </ul>

<b>INVENTORY PROFILES - Interest/Learning Style</b>
<p><b>Occupations of Highest Interest</b> (Fresno County Demand Occupations List):</p> <ul style="list-style-type: none"> <li>▪ Personal Care Aide</li> <li>▪ Substance Abuse/Behavioral Disorder Counselor</li> <li>▪ Nursing Assistant</li> </ul>
<p><b>Preferred Learning Style:</b> On a learning style inventory, the participant was self-described as a visual learner. Visual learners are generally able to visualize the final project after looking at drawn plans. Visual learners generally prefer materials that have pictures, graphics, and charts.</p>

**Work Interest Inventory (WII):** The subject is provided an interest made of occupations in the following career choices. Based upon their responses the participant demonstrated a higher interest in occupations related to the following employment clusters:

- Sales
- Caring and Helping

## SECTION 7: EMPLOYMENT GOALS

### JOB OF INTEREST

Several jobs of interest were discussed with the participant (see Job Interest Sheet and OCAT ASR). This Assessor discussed them with the participant. In determining the below listed employment goal, this Assessor considered the interests of the participant, academic ability, work history, current local labor market information, the participant's personal job preference and any known barriers to employment, including legal and health issues. Upon discussion, the participant chose the below listed employment goal as the current employment goal at this time.

### LABOR MARKET INFORMATION

According to the current U.S. Department of Labor's Bureau of Labor Statistics Occupational Outlook Handbook, employment of Home Health and Personal Care Aides is projected to grow 33 percent from 2020 to 2030, much faster than the average for all occupations.

<b>Primary Employment Goal</b>	Personal Care Aide	O*NET#: 39-9021
Recommended Activities/Available Resources:	<ul style="list-style-type: none"> <li>▪ Remediate English to the 4<sup>th</sup> grade</li> <li>▪ Remediate Math to the 4<sup>th</sup> grade</li> <li>▪ Enrollment in HSE preparation towards Certificate of High School Equivalency</li> <li>▪ Job club/Job search</li> </ul>	

### Factors Supporting the Selection of the Primary Employment Goal:

Yes	No		Yes	No	
X		Vocational Interest/Preference	X		Availability of Jobs (on Demand List)
X		Sufficient Academics Skills/Aptitudes	X		Motivation
X		Work History/Prior Training		X	Education Competency/History
X		Temperament	X		Work Values

English Reading Participant Demonstrated	Grade Level : 3.7
English Reading Job Requirement	Grade Level : 4.0
Math Participant Demonstrated	Grade Level : 3.8
Math Job Requirement	Grade Level : 4.0

### Comments:

The participant reported an interest in the occupation of Personal Care Aide. Ms. Participant demonstrated English reading and math skills were deficient of the recommended levels for this occupation. Therefore, remedial education at Clovis Adult School is recommended to improve reading and math skills and to make her more employable in this occupation. Furthermore, it is also recommended she completes a Certificate of High School Equivalency at Clovis Adult School. No further training is recommended for this occupation due to no availability.

## SECTION 8: SUMMARY/RECOMMENDATIONS/ACCOMMODATIONS

### Recommended Accommodations for Training, Adult Education and/or Employment:

- Extra time on tests or quizzes;
- Books on tape used in conjunction with printed text material;
- Use of a note taker as needed;
- Use of a tutor as needed;
- Read instructions or questions on any tests needed;
- Use of calculators; and
- Use of Grammar Check as necessary.

If you have any questions, please do not hesitate to call.

Evaluator Signature  & **Andrea Foster, M.A.**  
*Esmeralda Apresa, M.A.* *Andrea Foster, M.A., ICVE, ABVE, IPEC*

Date: 8/05/2022

Foster Assessment Center & Testing Service, 2350 West Shaw Avenue, Suite #118, Fresno, CA, 93711  
Phone (559) 721-7488 Fax (559) 721-7589 [EsmeraldaApresa@FosterAssessment.com](mailto:EsmeraldaApresa@FosterAssessment.com) or [Fresno@FosterAssessment.com](mailto:Fresno@FosterAssessment.com)

Attachments: Test Results; Participant Copy of LD Accommodations; Employment Services Case Managers Feedback Form.

Participant provided with recommendations for local community resources/web aids

**Foster Assessment Center & Testing Service, Inc. (FACTS)  
Learning Assessment Screening  
Fresno County Department of Social Services**

**Learning Disability Evaluation – Participant Copy**

<b>Participant:</b>	Sample Participant	<b>Job Specialist:</b>	Sample Job Specialist
<b>Case Number:</b>	B101010	<b>Evaluator:</b>	Esmeralda Apresa, M.A.
<b>Primary Language:</b>	English		
<b>Referring Office:</b>	Fresno County - DSS	<b>Assessment Site:</b>	Foster Assessment Center & Testing Service, Inc. (FACTS) Fresno, CA
<b>Dates of Attendance:</b>	8/3/2022		

**Learning Disability Identified:**  Yes  No

**Intellectual/Developmental Disability Identified:**  Yes  No

<b>Recommended Accommodations for Training and/or Employment</b>
<ul style="list-style-type: none"> <li>▪ Extra time on tests or quizzes;</li> <li>▪ Books on tape used in conjunction with printed text material;</li> <li>▪ Use of a note taker as needed;</li> <li>▪ Use of a tutor as needed;</li> <li>▪ Read instructions or questions on any tests needed;</li> <li>▪ Use of calculators; and</li> <li>▪ Use of Grammar Check as necessary.</li> </ul>

If you have any questions, please do not hesitate to call.

Evaluator Signature *Esmeralda Apresa* & *Andrea Foster, M.A.*  
*Esmeralda Apresa, M.A.* *Andrea Foster, M.A., ICVE, ABVE, IPEC*  
 Date: 8/05/2022

*Foster Assessment Center & Testing Service, 2350 West Shaw Avenue, Suite #118, Fresno, CA, 93711  
 Phone (559) 721-7488 Fax (559) 721-7589 [EsmeraldaApresa@fosterassessment.com](mailto:EsmeraldaApresa@fosterassessment.com)*

*Attachments: Test Results; Participant Copy of LD Accommodations; Employment Services Case Managers Feedback Form.*

*Participant provided with recommendations for local community resources/web aids*

**Foster Assessment Center & Testing Service, Inc.  
Independent Assessment Report  
Fresno County Department of Social Services**

**SAMPLE REPORT**

<b>Participant:</b> Sharon Sample	<b>Gender:</b> Female
<b>Case #:</b> 000000	<b>Assessor:</b> Ana Assessor, M.S., CVE, PVE
<b>Primary Language:</b> English	<b>Initial WTW Plan Date(s):</b> August 1, 2022
<b>Referring Office:</b> Coalinga Regional	<b>Independent Assessment Date:</b> September 12, 2022
<b>Employment Services Case Manager:</b> Mary Smith	<b>Assessment Site:</b> FACTS Fresno

<b>Employment Goal Requested by Participant:</b>	Licensed Vocational Nurse	DOT: 079.374-014 O*NET: 29-2061
<b>Activities/Services Requested:</b>	Vocational Training for LVN	
<b>Rationale for Requested Change:</b>	Participant is already enrolled in the LVN program at Cal State University Fresno	
<b>Rational Against Requested Change:</b>	Participant demonstrated 5 <sup>th</sup> grade math and 7 <sup>th</sup> grade reading comprehension. LVN requires 7 <sup>th</sup> grade math and 9 <sup>th</sup> grade reading.	

**RESPONSE TO INDEPENDENT ASSESSMENT REFERRAL**

Ms. Sample was requested to report for assessment at FACTS, Fresno in order to determine the suitability of the requested employment plan change, as it was noted that further testing appeared appropriate. Rather than determining the viability of the goal based strictly on current academic achievement, an evaluation of the participant’s cognitive processing and learning ability was reviewed. The following tests were administered, with the following results:

INTELLECTUAL/COGNITIVE/LEARNING PROFILE		Percentile
<b>NON-VERBAL INTELLIGENCE</b> TONI-4	TONI Index = 111	76 <sup>th</sup>
<b>GENERAL INTELLECTUAL ABILITY</b> Revised BETA III	BETA IQ = 100	50 <sup>th</sup>

Ms. Sample indicated that she was progressing in her LVN courses, and had been maintaining grades of “B’s and C’s.” She reported she enrolled in both math and reading remediation three months ago “when they initially tested my math at 3<sup>rd</sup> grade, and my reading at 5<sup>th</sup> grade.” The participant reported that she had increased her math and reading achievement by approximately two grade levels in each subject over a period of approximately 90 days. She also demonstrated average to above average ability to learn, based on the results of cognitive testing during this assessment.

Therefore, it is recommended that the participant proceed with her math and reading remediation coursework in addition to her LVN coursework (provided she maintains a minimum of a “C” average in the LVN coursework as monitored by the Employment Services Case Manager). FACTS will provide free follow-up of math and reading achievement testing over the course of the next twelve (12) months in order to determine if the participant is continuing to maintain her progress towards the recommended entry level achievement levels of 7<sup>th</sup> grade math and 9<sup>th</sup> grade reading. Follow up testing will cease if and when the participant achieves the recommended entry levels or when the participant drops below the recommended “C” average in her LVN coursework. If the participant drops below a “C” average, this assessor would recommend the participant proceed with the employment plan of Nurse’s Aide (O\*NET 31-1014, DOT 355.674-014) or for an alternate plan acceptable to her Employment Services Case Manager.

Assessor Signature \_\_\_\_\_ Date: \_\_\_\_\_  
Ana Assessor, MS, CVE, PVE

Foster Assessment Center & Testing Service, Fresno, CA, 93727  
Phone (559) 123-4567 Fax (559) 123-6789  
[AnaAssessor@FosterAssessment.com](mailto:AnaAssessor@FosterAssessment.com)

Attachments: Employment Services Case Manager Feedback Form

**F**OSTER  
**A**SSESSMENT  
**C**ENTER &  
**T**ESTING  
**S**ERVICE

# Goals for Today

2

- Company Overview & Experience
- FACTS Testing Weekly Schedule
- Limited English Proficiency Assessments
- Sample LEP Report
- Learning Disability Evaluations
- Sample LDE Report
- Vocational Research Tools
- Independent Assessments
- Participant/Worker Satisfaction Feedback & Annual Report
- How to Refer your Participant



# Company Overview & Experience

3



- Eight CARF-accredited testing centers
- Founded in 1984 with 38 continuous years of service
- Largest vocational evaluation and assessment provider in California
- Have conducted over 300,000 vocational and career assessments and learning disability evaluations for the CalWORKs programs alone
- Non-biased evaluations, with no ties to any remuneration (tuition) or conflicts of interest occurring within institutional financial gain
- Have access to over 200 psychometric instruments and hands-on work samples



50 S. Anaheim Blvd., Suite 251 **Anaheim**, CA 92805  
(714) 635-5370 Fax (714) 635-5372  
[Anaheim@FosterAssessment.com](mailto:Anaheim@FosterAssessment.com)

5121 Stockdale Hwy., Suite 250 **Bakersfield**, CA 93309  
(661) 396-7863 Fax (661) 396-7865  
[Bakersfield@FosterAssessment.com](mailto:Bakersfield@FosterAssessment.com)

2350 West Shaw Avenue, Suite 118, **Fresno**, CA 93711  
(559) 721-7488 Fax (559) 721-7589  
[Fresno@FosterAssessment.com](mailto:Fresno@FosterAssessment.com)

3447 Atlantic Ave., Suite 215 **Long Beach**, CA 90807  
(562) 570-3788 Fax (562) 570-3652  
[LongBeach@FosterAssessment.com](mailto:LongBeach@FosterAssessment.com)

1605 West Olympic Blvd., Suite 509 **Los Angeles**, CA 90015  
(213) 353-0782 Fax (213) 353-0792  
[LosAngeles@FosterAssessment.com](mailto:LosAngeles@FosterAssessment.com)

1603 E. Palmdale Blvd., Suite E **Palmdale**, CA 93550  
(661) 272-9397 Fax (661) 272-0181  
[Palmdale@FosterAssessment.com](mailto:Palmdale@FosterAssessment.com)

16921 Parthenia Blvd., Suite 205 **Northridge**, CA 91343  
(818) 996-2015 Fax (818) 996-6531  
[Northridge@FosterAssessment.com](mailto:Northridge@FosterAssessment.com)

**Administrative Office:**

516 Pennsfield Place, Suite 108 **Thousand Oaks**, CA 91360  
(805) 497-1685 Fax (805) 497-2525 [ThousandOaks@FosterAssessment.com](mailto:ThousandOaks@FosterAssessment.com)

L  
O  
C  
A  
T  
I  
O  
N  
S

# Fresno Center Information

5

- Our Fresno center on West Shaw Avenue is open from 8:00 am to 5:00 pm, Monday through Friday
- FACTS currently provides three different assessment services for Fresno County:
  - Limited English Proficiency Assessments
  - Learning Disability Evaluations
  - Independent Assessments
- We regularly travel to Selma and Reedley
- FACTS has no charge for additional testing, extra assessment days, rescheduling your participant, re-evaluations (within one year of original assessment) or exit conference meetings. Use us as a free consultant with any questions concerning your referred participant...for up to a year after they complete their assessment. We are here to help.



Foster Assessment Center & Testing Service, Inc.  
**(FACTS)**  
2350 West Shaw Ave., Suite #118  
Fresno, CA 93711



 Bus stop location

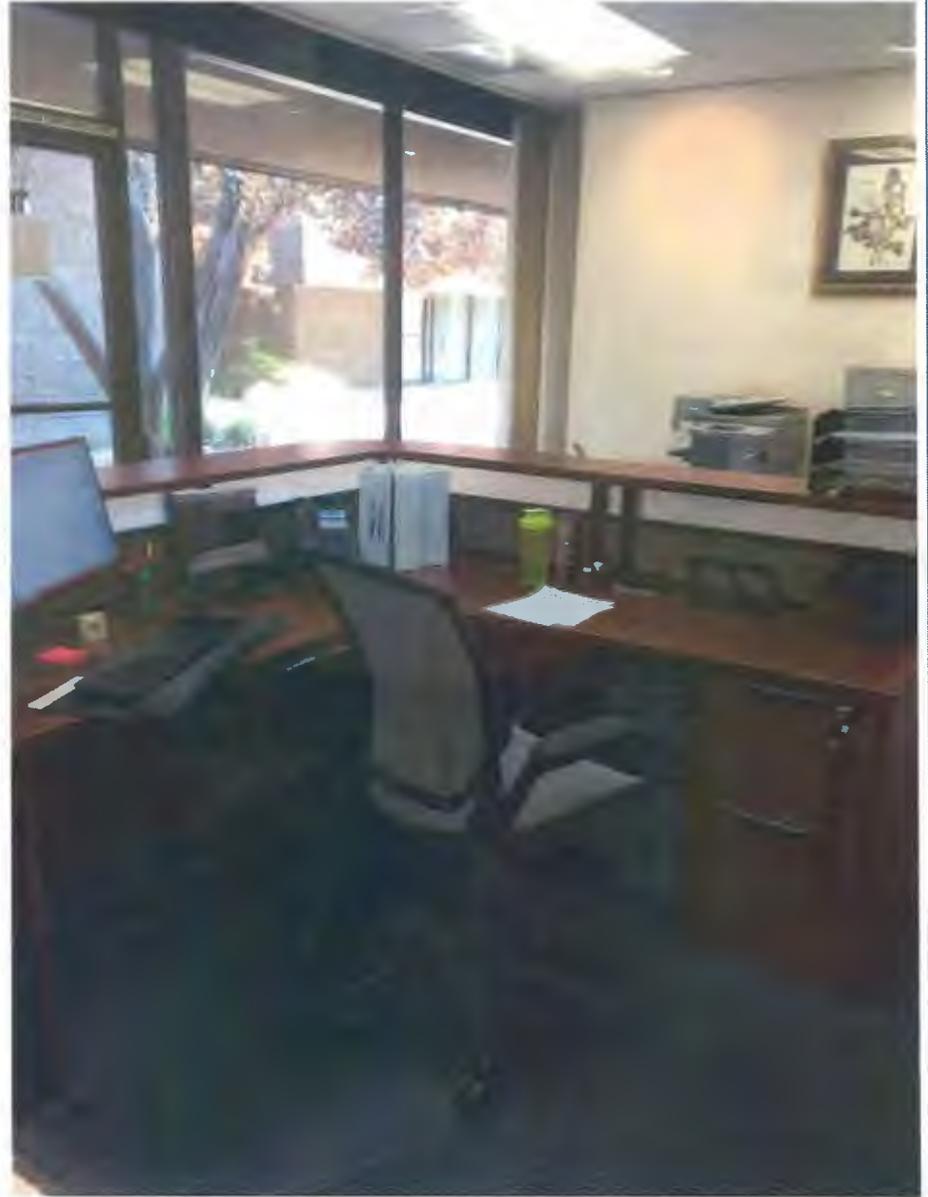
For Assistance, please call  
(559)721-7488

# Since we are virtual...let's take a look at the FACTS Fresno Center

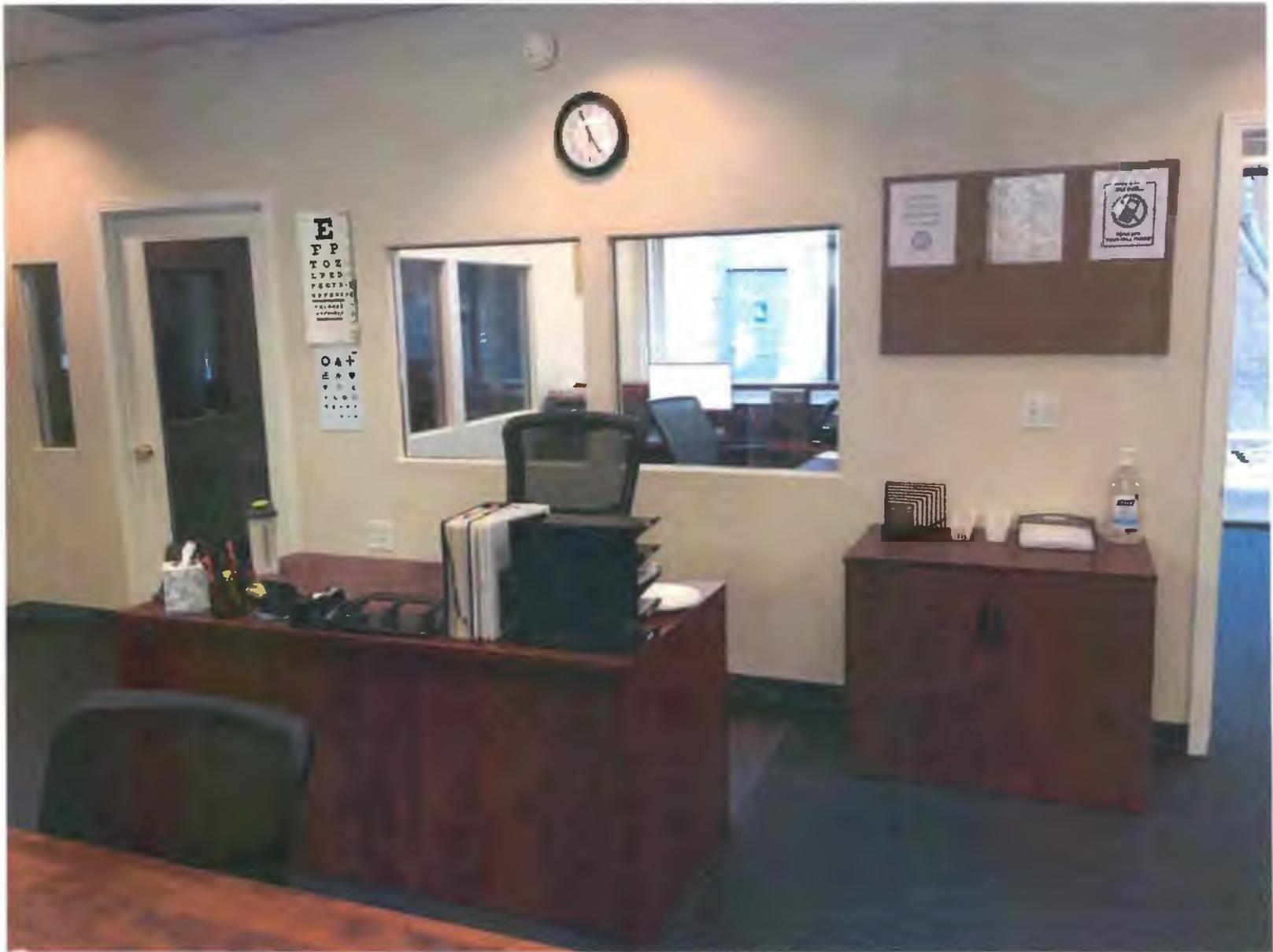
7



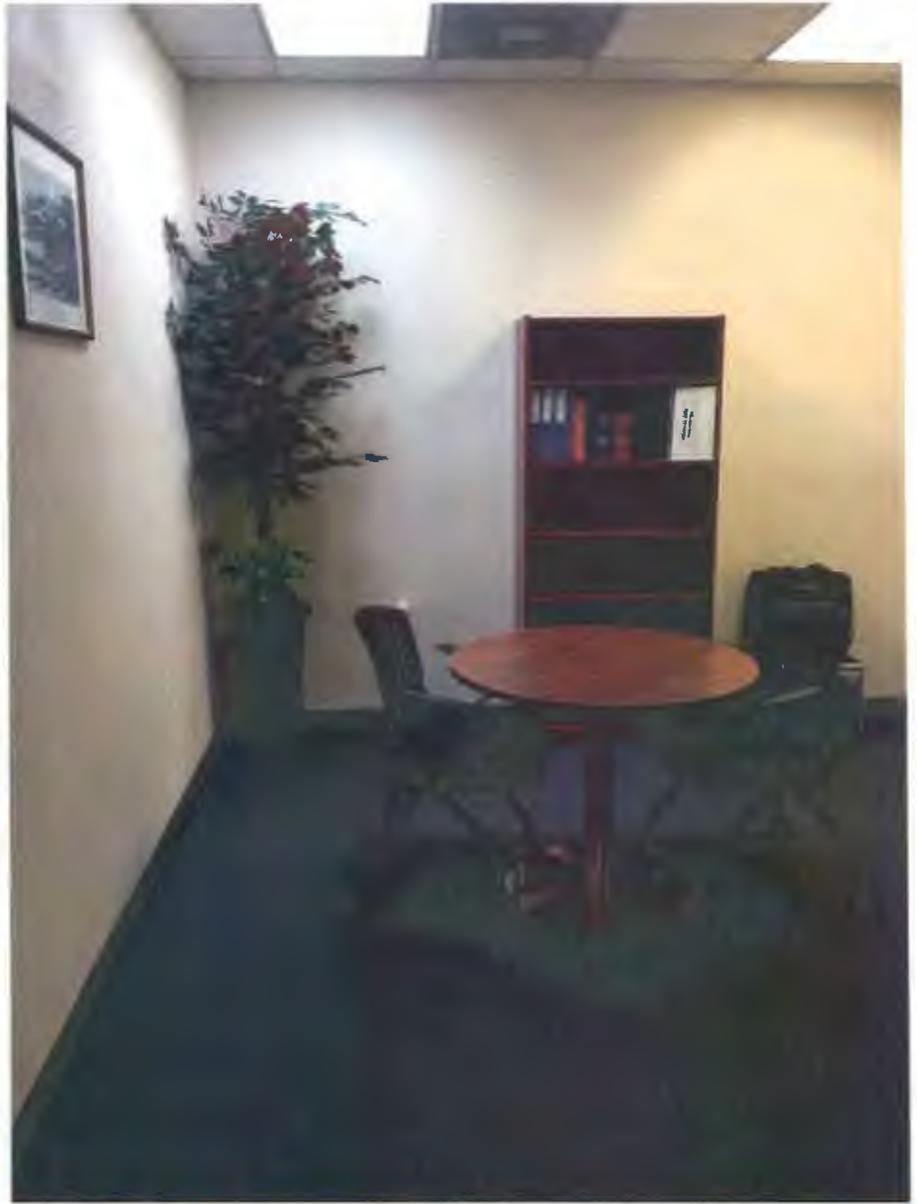
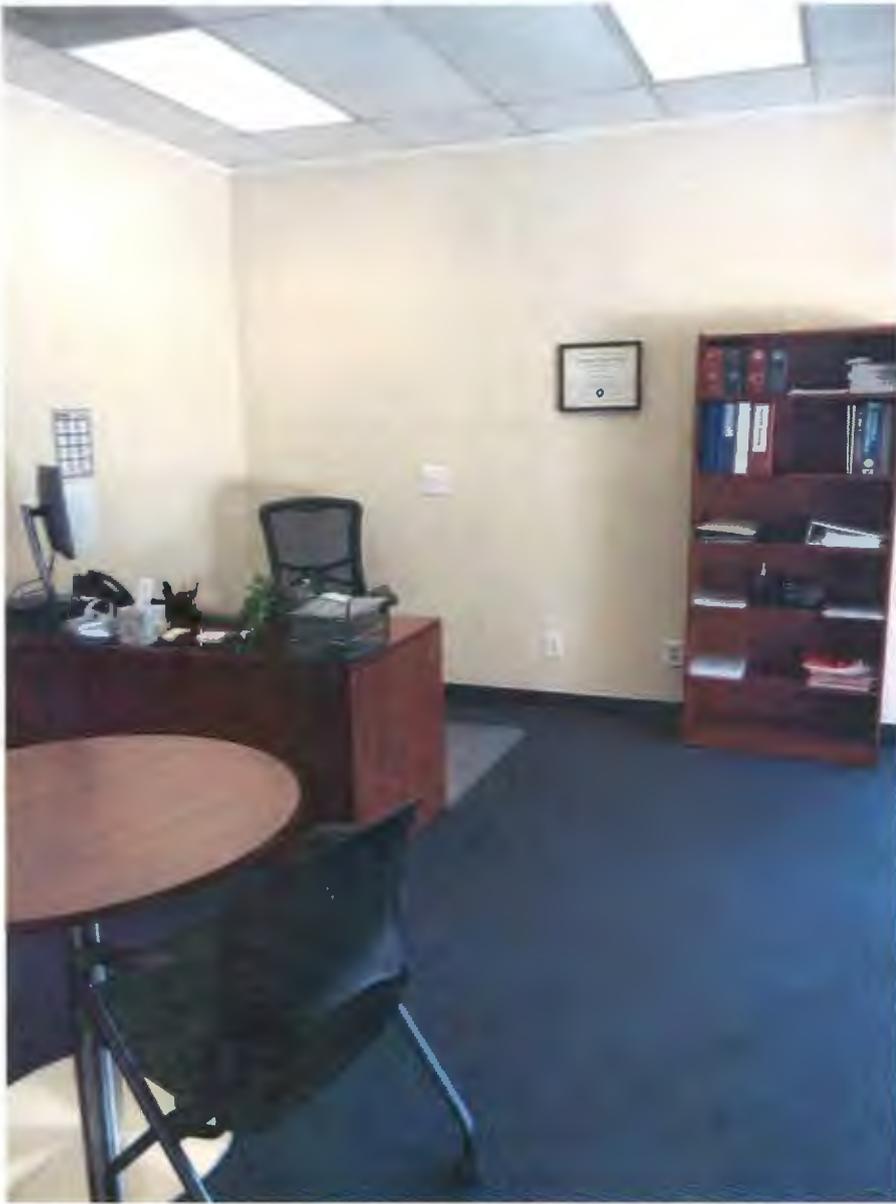
Entrance to Reception Area



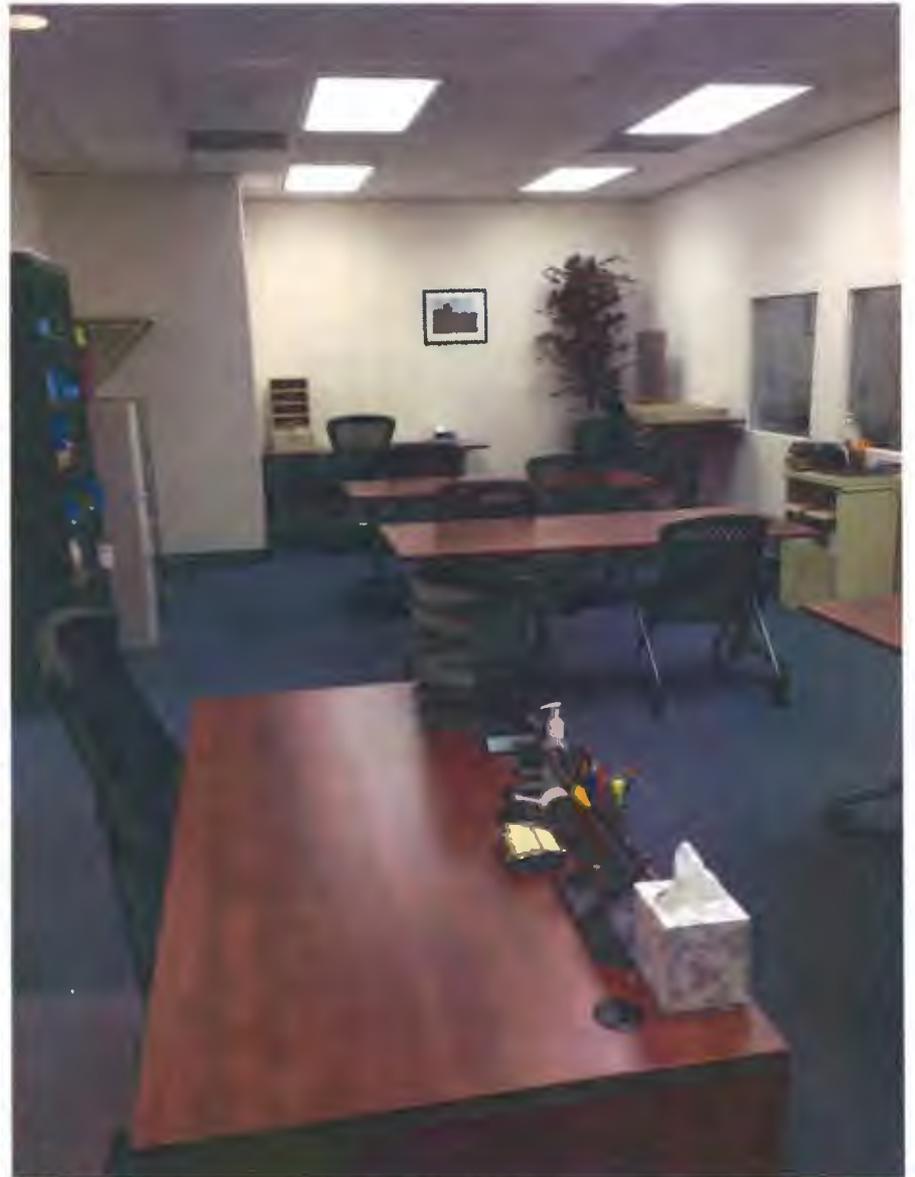
Reception Area



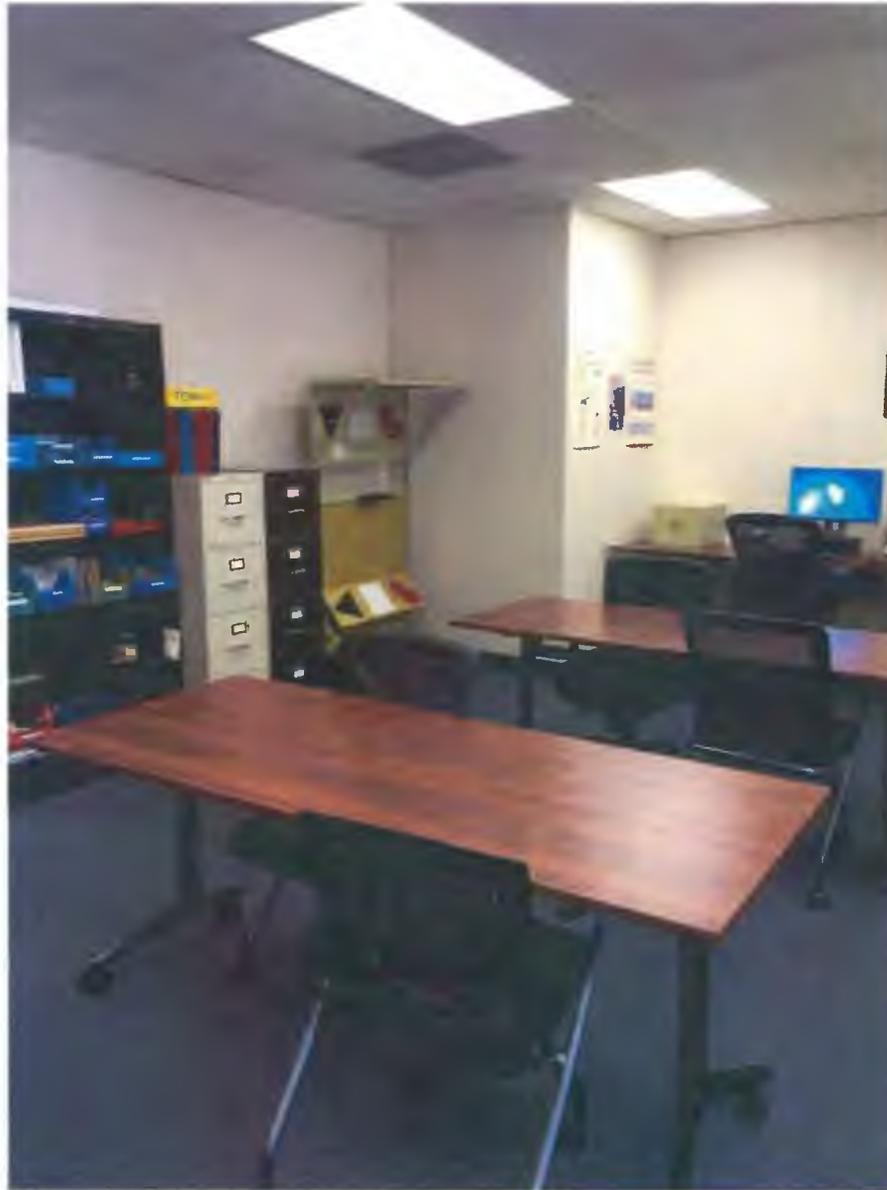
Technician Desk in Main Testing Area



Evaluator Offices



Portions of Main Testing Area



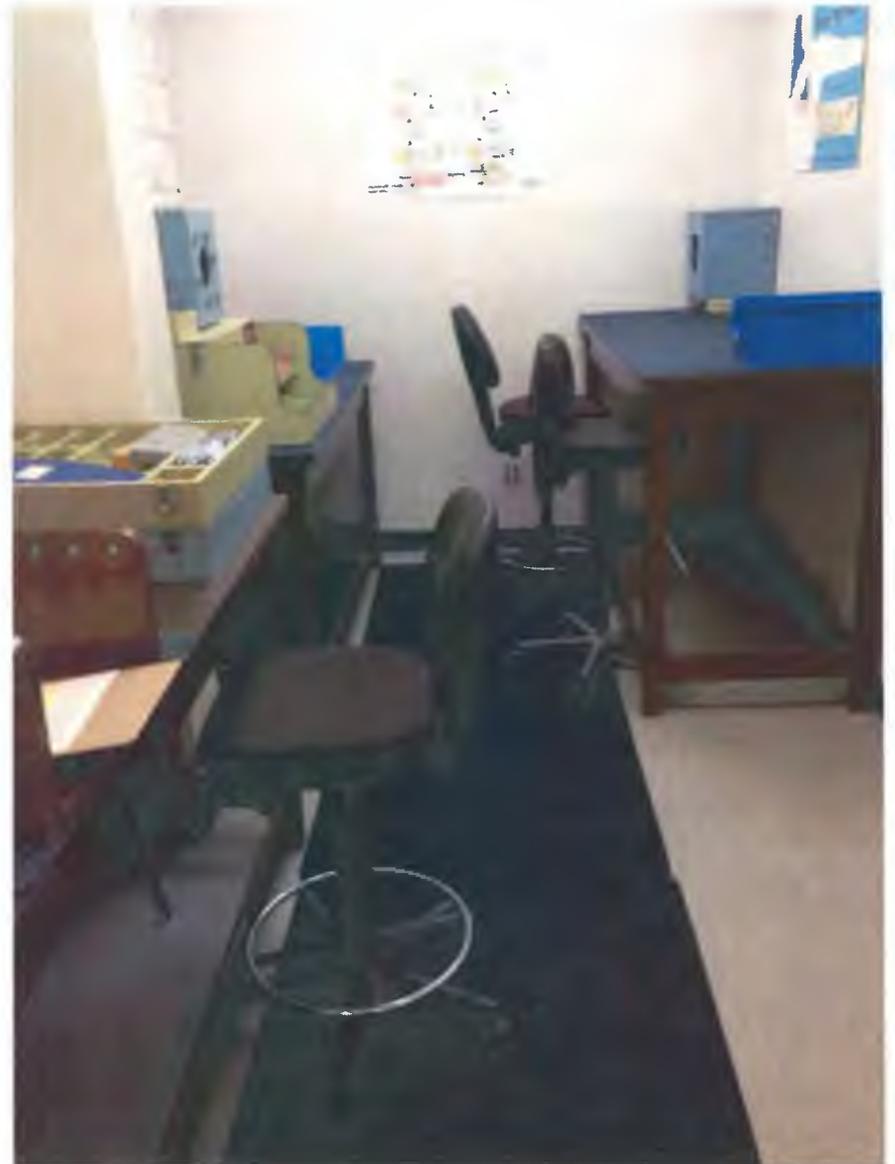
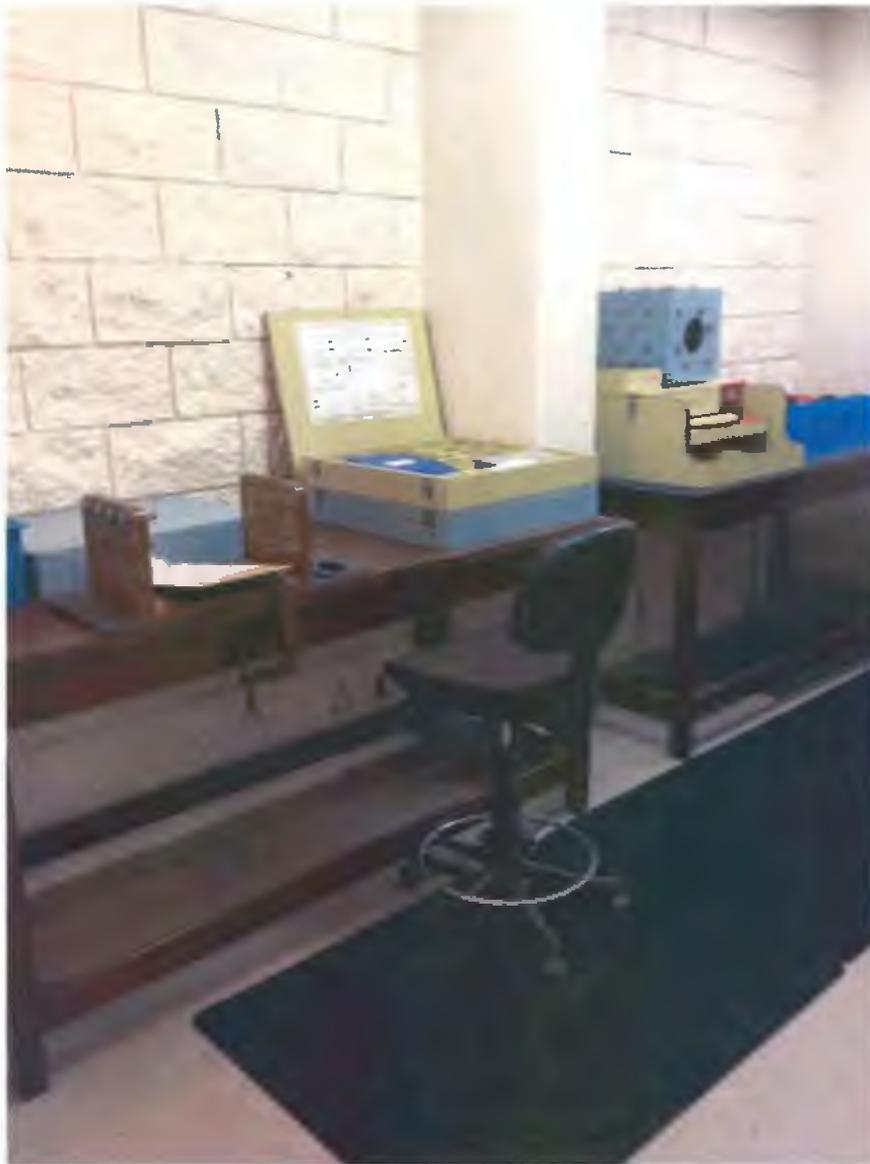
Each **Participant** has an **Individual** Work Station



Large, Quiet Testing Areas



Break Room with Available Refrigerator and Microwave



Enclosed Shop Area for Hands On / Manual Dexterity Tests



Large Conference Room

*Please call if you would ever like to*

SCHEDULE  
A *Visit*

*to see the center and meet in person*

# FACTS Testing Weekly Schedule

18

Assessment Type	Definition
LEP	Limited English Proficiency – (Spanish ONLY)
NENS	Non-English-Non-Spanish
LDE	Learning Disability Evaluation – Without a Plan
LDP	Learning Disability Evaluation – With a Plan

<u>Monday</u>	<u>Tuesday</u>	<u>Wednesday</u>	<u>Thursday</u>	<u>Friday</u>
(10:00 a.m. – 2:00 p.m.) 4 LEP's	(8:30 a.m. – 11:30 a.m.) 2 NENS	(10 a.m.-3:00 p.m.)  3 LDE's/LDP's	(8:30 a.m. – 11:30 a.m.)  2 NENS	No Assessments
(2:00 p.m. – 4:30 p.m.)  4 LEP's	(1:00 p.m.-5:00 p.m.) 3 LEP's <b>or</b> 2 LDP/LDE <b>or</b> 2 NENS (same language) <b>Selma and Reedley</b> (Scheduled in the afternoon, only if needed. Client must confirm attendance prior to the evaluator making the trip to the rural site.)		(10 a.m.-3:00 p.m.)  3 LDE's/LDP's	

# Frequent Testing Given to Participants

19

## Common Psychometrics

- Aptitude and achievement tests
- Cognitive, reasoning and IQ tests
- Learning disability identification
- Vocational interest inventories
- Personality profiles
- Mental alertness tests
- Auditory processing (verbal) tests
- Spatial perception tests
- Background information inventories
- Self-assessment questionnaires
- Values identification surveys

## Common Work Samples

- Manual dexterity performance tests
- Fine finger dexterity performance tests
- Clerical/bookkeeping aptitude tests
- Computer-based competency tests
- Typing proficiency tests
- Mechanical aptitude tests
- Sales aptitude
- Memory ability
- Color discrimination tests
- Physical exertion tolerances

## Limited English Proficiency Assessments

20

**Group Served:** CalWORKs WTW participants who have been identified as limited English proficient, meaning individuals who do not speak English as their primary language and who have a limited ability to read, speak, write or understand English (primarily Spanish, Hmong, Arabic, Punjabi, Persian, Farsi, Ukrainian, Russian, Armenian and Cambodian).

**Purpose:** To identify and appraise the level of English proficiency, academic achievement, barriers to employment, strengths and vocational interests in relation to preparation for vocational training and/or job placement, with the ultimate goal of self sufficiency.

**Outcome:** Knowledge and utilization of assessment information shall lead to enrollment and placement of CalWORKs participants whose skill levels and needs are realistically and appropriately matched to a specific formal training program and/or job requirements.

# How Do I Get My Participant to Show?

21

- Call your participant two days before to remind them of their scheduled evaluation!
- Arrange childcare and/or transportation.
- Remind them they cannot fail the assessment or lose any of their benefits.
- Give the participant the flyer as a reminder, filling in the date of their assessment.

## Limited English Proficiency Assessment

***Testimonials***

"The results were very uplifting and helpful, as well as the Assessor's input and suggestions."

"This was such a positive, impactful experience. I learned a lot about myself and I am excited about my future."

"The experience was educational and motivating towards my career goals."

"I'm glad I had an opportunity like this to know where I stand academically."

"I was concerned prior to starting that I would be expected to take the first [employment] position available and abandon my goals and dreams of my desired career path. I greatly appreciate my feedback and look forward to my new endeavors."



A Limited English Proficiency Assessment will provide you with the opportunity to evaluate your aptitudes, academic abilities and vocational skills in order to appropriately plan your career. The goal of this program is to assist you in preparing for, attaining and thriving in employment while achieving self-sufficiency. You will work closely with an assessment professional. You're assessment results will be sent to your Employment Services Case Manager, who will help you implement your employment plan and give you a path towards achieving your goals.

***Benefits of a Limited English Proficiency Assessment:***

- Learn how your language, reading and math skills relate to your job goals
- Learn how to improve your English skills
- Discuss ways to eliminate employment barriers
- Discover vocational interests
- Learn more about the job market
- Better understand your career ladder
- Start your path to success, self-sufficiency and independence!



**F**OSTER  
**A**SSESSMENT  
**C**ENTER &  
**T**ESTING  
**S**ERVICE, INC.

**Your assessment is scheduled from 9:00 A.M to 4:00 P.M. :**

\_\_\_\_\_ (Date)

\_\_\_\_\_ (Location)

## What Information Can You Expect Within the Assessment Report?

22

- Participant's name, case number, dates participant was administered tests and interviewed
- Previous work history and employment skills along with educational history and present competency levels
- Job readiness skills, strengths and limitations/barriers
- Listed employment goal and timeline to achieve that goal, as well as necessary resources
- Recommendations for the participant's subsequent assignment to Welfare-to-Work activities
- Scores and interpretation of any and all tests administered



**Foster Assessment Center & Testing Service, Inc.**  
**Limited English Proficiency Assessment**  
**Fresno County Department of Social Services**

**SECTION 1: PARTICIPANT INFORMATION**

<b>Participant:</b> Mira Smith	<b>Employment Services Case Manager:</b> Bill Specialist
<b>Case #:</b> 1F5P019	<b>Assessor:</b> Esmeralda Apresa, B.A.
<b>Primary Language:</b> Spanish	<b>Date(s) of Attendance:</b> 8/30/2021
<b>Referring Office:</b> Fresno County - DSS	<b>Assessment Site:</b> Foster Assessment Center & Testing Service, Inc. (FACTS) Fresno, CA

**SECTION 2: PARTICIPANT BACKGROUND**

The participant reported, "I have high blood pressure and arthritis in both of my knees. I take medicine for both of these medical issues. However, I do not think my medical issues would intervene with work; I feel that I am still able to work even if it is more minimal than when I was younger."

Additionally, the participant reported, "I was a victim of domestic violence five years ago (2016). I was receiving therapy for about two years through a low-income program while I lived in Los Angeles. During those two years, the therapist focused on the incident itself. However, since I felt it was helpful to attend those sessions, I recently began therapy again. I began attending about three weeks ago; I feel safe from my past, but I feel that I need to work on myself now."

Furthermore, the client reported, "In 2008 I got pulled over for Driving Under the Influence (DUI), I had to pay a fine and I also attended classes for it. I did not have a driver's license then, and now, I am scared to try and take the driver's license test because I am not sure if the DUI is still on my permanent record." Moreover, she reported, "I currently take the bus or a taxi to get to my appointments, and it would be beneficial if I would be able to obtain transportation assistance." Also, the participant indicated the need for childcare assistance, as she reported, "I need help finding reliable childcare, especially if I want to get a full-time job. I am really looking forward to obtaining a fulfilling job in which I can do more than just physical work."

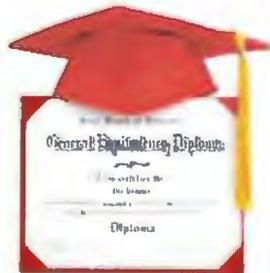
Education/Training Reported	School Name (Location)	Area of Study	Grade Completed or Degree/Certification	Date Completed
High School	Gardena High (Gardena, CA)	General Studies	Diploma	2005
Adult School	Fresno Adult (Fresno, CA)	Office Assistant	Two weeks (2021)	"Currently attending"

Work History Reported Job Title (Name of Employer)	Length/Years of Employment	Reason for Leaving
Hand Packer & Packager (Aerotek)	Three weeks (May 2021)	"No reliable child care"
Cashier (El Mercado Super)	Two months (March-May 2021)	"No reliable child care"
Stocker (Amazon)	Eight months (2020)	"Found a job with a more flexible schedule"
Shipping Clerk (Permaswage)	10 years (2010-2020)	"Laid off due to COVID"

## What type of information is reviewed with the participant prior to deciding on an employment goal?

24

- ❓ The entry level reading and math required for the occupation
- ❓ The entry level wages generally offered
- ❓ If a high school diploma or GED is generally required
- ❓ The length of the typical training program
- ❓ Formal training available within the County
- ❓ The lifting, standing, sitting involved



## What vocational research tools does the Evaluator use to come up with job recommendations?

25

- Fresno County Demand List
- Fresno County Job Demand Summary
- O\*NET Online / U.S. Department of Labor
- Dictionary of Occupational Titles (D.O.T.)
- Employment Development Department (EDD)
- Occupational Outlook Handbook
- California Occupational Guides
- CalWORKs Program Staff
- Local Fresno Universities/Adult School Programs
- California Department of Rehabilitation
- Local Fresno Community Liaisons



**F**  
**A**  
**C**  
**T**  
**S**

# What is a Learning Disability (LD)?

26

According to Section 56036  
Subchapter 1 of Chapter 7 of  
Division 6 of Title 5 of the  
California Code of  
Regulations.....



*A learning disability is  
a persistent neurological condition  
that continues despite instruction in standard classroom situations  
and may exist with other disabling conditions....*

## In English Please...

27

Think of your brain as an automobile. The engine (your IQ) is great, fully powered, and raring to go. When you want to reach a destination (for example, find an answer to that math question) some autos get you where you want to go quickly, and stay on the right road during the trip (calculate the correct math answer). Some get lost on the trip, but get there slowly. Other autos never get to the correct destination (are not able to solve that math problem, understand that written paragraph or verbal lesson, or are able to correctly spell).



A learning disability is typified by an average to above average IQ, but below average ability to learn some things. The reasons may be varied. Maybe your engine is great, but:

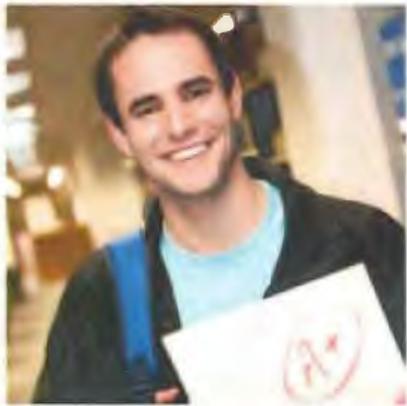
- you have run out of gas (the synaptic connections in your brain are not firing), or
- your GPS is malfunctioning (the connections are misfiring to the wrong areas), or
- your headlights are out, you cannot travel in the dark and are losing time (the connections are slower and your learning is delayed), or
- etc, etc.

There are many reasons that the automobile with the great engine (average to above average IQ) is not getting you to your destination or letting you learn like others...you just don't know why...and most likely, no one has ever explained it to you.

You will notice that your participants generally fall into one of three categories:

28

(1) Average to Above Average Intelligence with Average to Above Average Academics



(2) Average to Above Average Intelligence with Below Average Academic(s) = **Learning Disabled**

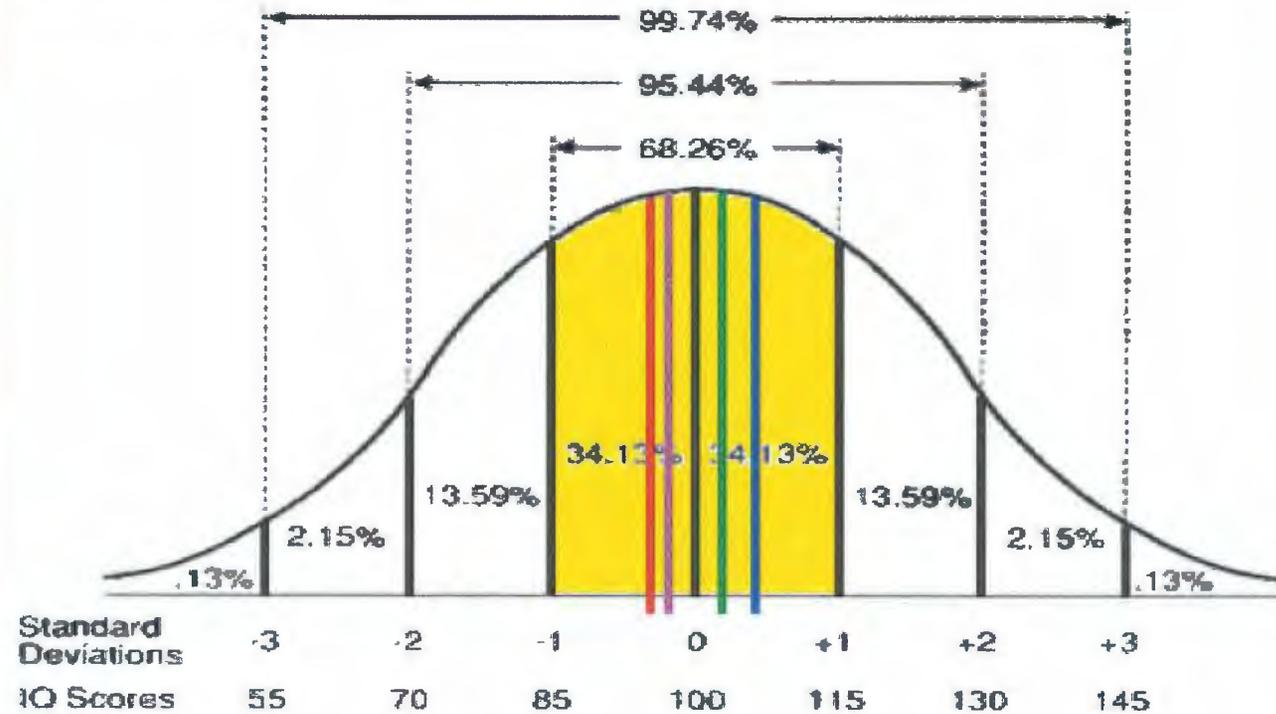


(3) Below Average Intelligence with Below Average Academic(s) = **Intellectually Disabled**

# What is an average Intelligence Quotient?

29

Distribution of IQ Scores



# Differences Between LD & ID

30

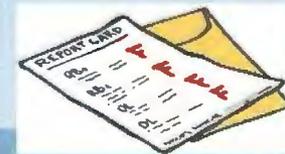
## Learning Disabled (LD)

- At least average IQ (approximately 80 or better)
- Below average reading, spelling, or math computation, etc.
- Can usually successfully attend formal training classes if they have accommodations



## Intellectually Disabled (ID)

- Below average IQ (approximately 70 or less)
- Below average reading, spelling and math, etc.
- Will most likely never successfully complete formal training programs unless almost entirely hands-on



# Learning Disability Clues To Look For

31

- Scored 12 or more on the LD screening tool in OCAT
- Discrepancies in achievement grade levels
- Achievement that does not correlate with intelligence
- Stories of struggles in school
- Previously diagnosed with an LD, ID or ADHD
- Difficulty organizing or keeping appointments
- Problems filling out your forms
- Trouble maintaining employment
- Problems with social skills
- Struggles with self confidence



# Is LD Determination That Easy?



LD status can be clouded by a number of other factors:

- Head trauma/traumatic brain injury (TBI)
- Other medical conditions
- Present or past drug/medication/substance use/abuse
- Etc....Etc....Etc....

Listen well when you interview your participant for signs of the above. Frequently someone with a drug problem will describe failing tests way back in the 3<sup>rd</sup> grade...well before their drug problems started. Many times a LD or ID can contribute to drug issues. If you determine the participant is **struggling in school, has trouble maintaining employment, and/or scores greater than a 12 on the screening device**, they should be referred for a learning disability evaluation.

There are also a number of other factors that the Evaluator takes into consideration...

33

- If memory is affecting obtaining the correct answer
- Types of errors (small, reversed, confused...)
- How task is organized
- Speed/fluency
- Accuracy
- Etc, etc, etc...



# At the End of the Evaluation...

34

The evaluator will meet individually with each participant to review the test results.

The participant will:

- know what a learning disability is,
- know if they are learning disabled and how it is affecting them,
- know which accommodations will help them,
- know how to get their accommodations at school, and
- have an employment goal that matches their skill and interest levels.





# Examples of Frequently Recommended Reasonable Accommodations



35

- Allow use of a calculator
- Allow use of a tape recorder for educational programs, testing or training
- Allow use of spell check
- Allow use of books on tape
- Provide assistance with written work, forms, and/or applications
- Allow additional time for testing, quizzes, educational services, and/or learning new information
- Allow utilization of a Temporary Job Coach for initial stages of training
- Allow tutoring for educational programs
- Allow use of a note taker



## What Information Can You Expect Within the Learning Disability Evaluation Report?

36

- Participant's name, case number, dates participant was administered test and interviewed
- Previous work history and employment skills along with educational history and present competency level
- Job readiness skills, strengths and limitations/barriers
- Learning Disability identification
- Identification of an employment goal and recommendations to achieve that goal as well as necessary resources
- Recommendations and accommodations for the participant's subsequent assignment to Welfare-to-Work activities
- Scores and interpretation of any and all tests administered
- Participant copy of Learning Disability accommodations



**Foster Assessment Center & Testing Service, Inc.**  
**Learning Disability Evaluation**  
**Fresno County Department of Social Services**

**SECTION 1: PARTICIPANT INFORMATION**

<b>Participant:</b>	Martha Jones	<b>Job Specialist:</b>	Maria Specialist
<b>Case Number:</b>	1B01010	<b>Evaluator:</b>	Esmeralda Apresa, B.A.
<b>Primary Language:</b>	English		
<b>Referring Office:</b>	Fresno County - DSS	<b>Assessment Site:</b>	Foster Assessment Center & Testing Service, Inc. (FACTS) Fresno, CA
<b>Dates of Attendance:</b>	9/29/2021		

**SECTION 2: PARTICIPANT BACKGROUND**

The participant reported, "I have problems with math, reading, concentration, study skills, memory and understanding things. I always struggled with math since I was in elementary school. I can recall repeating 7<sup>th</sup> grade because I had a really hard time passing my math classes. I was even put in a different class to get extra help with my math work but it never really stuck to me." Additionally, she reported, "I ended up dropping out of school after completing 8<sup>th</sup> grade and I never went to high school because I was afraid I would not pass my math classes. I did go back to an adult school for two years when I was 18 years old, but I had to stop going because it was too hard. I couldn't understand the lessons or the homework."

The participant indicated the need for childcare and transportation assistance. She also stated that she had a clean legal background.

Education/Training Reported	School Name (Location)	Area of Study	Grade Completed or Degree/Certification	Date Completed
Adult School	Chowchilla Adult Education (Fresno, CA)	General Studies	Two years (Departed in 1996)	Did not complete; "Stopped because it was too hard"

Work History Reported Job Title (Name of Employer)	Length/Years of Employment	Reason for Leaving
Fruit Cutter (Wawona Frozen Foods)	Two months (May-July 2021)	"Not enough hours."
Meat Cutter (Foster Farms)	Ten months (October 2018 – August 2019)	"The job was physically draining."

**Reported Transferable Skills:**

- Packing
- Sorting

# How does the participant get their accommodations from their school?

38

Foster Assessment Center & Testing Service, Inc. (FACTS)  
Learning Assessment Screening  
Fresno County Department of Social Services

## Learning Disability Evaluation – Participant Copy

Participant:	Martha Jones	Job Specialist:	Maria Specialist
Case Number:	1B010101	Evaluator:	Esmeralda Apresa, B.A.
Primary Language:	English		
Referring Office:	Fresno County - DSS	Assessment Site:	Foster Assessment Center & Testing Service, Inc. (FACTS) Fresno, CA
Dates of Attendance:	9/29/2021		

Learning Disability Identified:  Yes  No

Intellectual/Developmental Disability Identified:  Yes  No

<b>Recommended Accommodations for Training and/or Employment</b> <ul style="list-style-type: none"><li>▪ Extra time on tests or quizzes:</li><li>▪ Books on tape used in conjunction with printed text material:</li><li>▪ Use of a note taker as needed:</li><li>▪ Use of a tutor as needed:</li><li>▪ Read instructions or questions on any tests needed: and</li><li>▪ Use of calculators</li></ul>
--

If you have any questions, please do not hesitate to call.

Evaluator Signature  Date: 10/04/2021  
Esmeralda Apresa, B.A.

Foster Assessment Center & Testing Service, 2350 West Shaw Avenue, Suite #118, Fresno, CA, 93711  
Phone (559) 721-7488 Fax (559) 721-7589 [EsmeraldaApresa@fosterassessment.com](mailto:EsmeraldaApresa@fosterassessment.com)

Attachments: Test Results; Participant Copy of LD Accommodations; Employment Services Case Managers Feedback Form.

Participant provided with recommendations for local community resources/web aids

## How can the Job Specialist explain to the Participant that they are found to be Learning Disabled?

39

Remember, the evaluator will have already explained the findings at the time of the evaluation, so when you speak with the participant, they will already know the following:

- **A learning disability is a persistent neurological condition...**
- *“...This is something you were probably born with and is not your fault. It is pretty common and affects many people....”*
- **...that continues despite instruction in standard classroom situations...**
- *“...You probably really tried in school, and it didn’t seem to help...”*
- **...and may exist with other disabling conditions...**
- *“...It appears to be not only affecting your reading comprehension, but also your math skills. But I am going to try to help you. Because of these problems I am going to document this condition, and include in my report some accommodations that will help you in both a classroom situation and on the job. Accommodations like a calculator, extra time and a note taker, even during tests, will help make school and your job easier.”*

## How can the Job Specialist explain to the Participant that they are found to be Intellectually Disabled?

40

This is a much more difficult situation, and most likely the participant has struggled in school all their lives. They are typically a high school dropout, and many times have avoided school at all costs. Some may have tried numerous adult education/training courses...failing all of them. Some have been told that if you just “keep trying” in school you will succeed. Your participant may have trouble understanding what you are saying or what it means. Keep things simple, and take a proactive role in guiding them with each step.

- *“The results of the testing you completed tell me that no matter how hard you try in school, you are going to have trouble learning new things, especially from books. We have a few options:*
- *...we can get you involved in a job that you know well;*
- *...we can try a class that teaches everything with a hands-on approach and avoids books or written tests;*
- *...we can see what other services are available for you within the community.”*



# Independent Assessments

41

- **Group Served:** Participants who disagree with the assessments conducted by DSS, or when thought to be appropriate.
- **Purpose:** To confirm results obtained by in-house DSS assessments, or choose more realistic and attainable employment goal if needed.
- **Outcome:** Ensure the participant, DSS and FACTS are in agreement on a course of action during participant's time on aid.



# After each assessment or evaluation, every Participant and Job Specialist is asked to fill out a Satisfaction Feedback Form

**FOSTER ASSESSMENT CENTER & TESTING SERVICE, INC  
CONSUMER SATISFACTION FEEDBACK FORM**

DL:F4.0

Location: \_\_\_\_\_ Evaluator/Assessor: \_\_\_\_\_

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

Program Referred From:  Department of Rehabilitation  Vocational Rehabilitation  
 CalWORKs  WIA  Veteran

This form is intended to give you the opportunity to communicate your opinions about your completed vocational evaluation.

1. Was the evaluation a valuable experience?  
Yes \_\_\_\_\_ No \_\_\_\_\_
2. Was the evaluation staff courteous and professional?  
Yes \_\_\_\_\_ No \_\_\_\_\_
3. Did you understand the purpose of the evaluation?  
Yes \_\_\_\_\_ No \_\_\_\_\_
4. Was the evaluation staff able to answer any questions that you may have had about any specific tests or procedures?  
Yes \_\_\_\_\_ No \_\_\_\_\_
5. Did the information provided to you by your vocational evaluator help you in making an employment decision?  
Yes \_\_\_\_\_ No \_\_\_\_\_
6. What would you change about the evaluation?  
\_\_\_\_\_  
\_\_\_\_\_
7. Do you feel your rights were respected during the evaluation?  
Yes \_\_\_\_\_ No \_\_\_\_\_
8. Do you feel the evaluator fully considered your interests and desires?  
Yes \_\_\_\_\_ No \_\_\_\_\_
9. Were you scheduled to participate in the evaluation in a timely manner?  
Yes \_\_\_\_\_ No \_\_\_\_\_
10. Were you satisfied with the services provided to you?  
Very Satisfied \_\_\_\_\_ Somewhat Satisfied \_\_\_\_\_ Dissatisfied \_\_\_\_\_
11. How can we improve our services?  
\_\_\_\_\_  
\_\_\_\_\_

Additional comments: \_\_\_\_\_  
\_\_\_\_\_

4-01  
Revised 8/1/93

**COUNSELOR EVALUATION FEEDBACK FORM**

Thank you for your referral to Foster Assessment Center & Testing Service, Inc. We wish to provide you the utmost in quality vocational evaluations. Please take a moment and help us continue to improve our process by answering the following questions:

Consumer / Participant Name: \_\_\_\_\_ Date(s) of Evaluation: \_\_\_\_\_

Vocational Evaluator Name: \_\_\_\_\_ Evaluation Location: \_\_\_\_\_

Program referring from:

Department of Rehabilitation  Voc Rehab / Worker's Comp.  CalWORKs/TANF  WIA  Veteran

1. Did you receive your report in a timely manner?  Yes  No
2. Was the report easily understandable and include all pertinent information?  Yes  No
3. If you had questions concerning the report, was the vocational evaluator responsive and helpful?  Yes  No
4. Were you satisfied with the vocational recommendations and findings?  Yes  No  N/A
5. If you attended an exit conference, was it handled professionally?  Yes  No  N/A
6. Your overall satisfaction with the service we provided:  Very satisfied  Somewhat satisfied  Dissatisfied
7. Any additional comments: \_\_\_\_\_  
\_\_\_\_\_

Your name: \_\_\_\_\_ Phone number: \_\_\_\_\_

Your location: \_\_\_\_\_ Email address: \_\_\_\_\_

How can we improve our services?  
\_\_\_\_\_  
\_\_\_\_\_

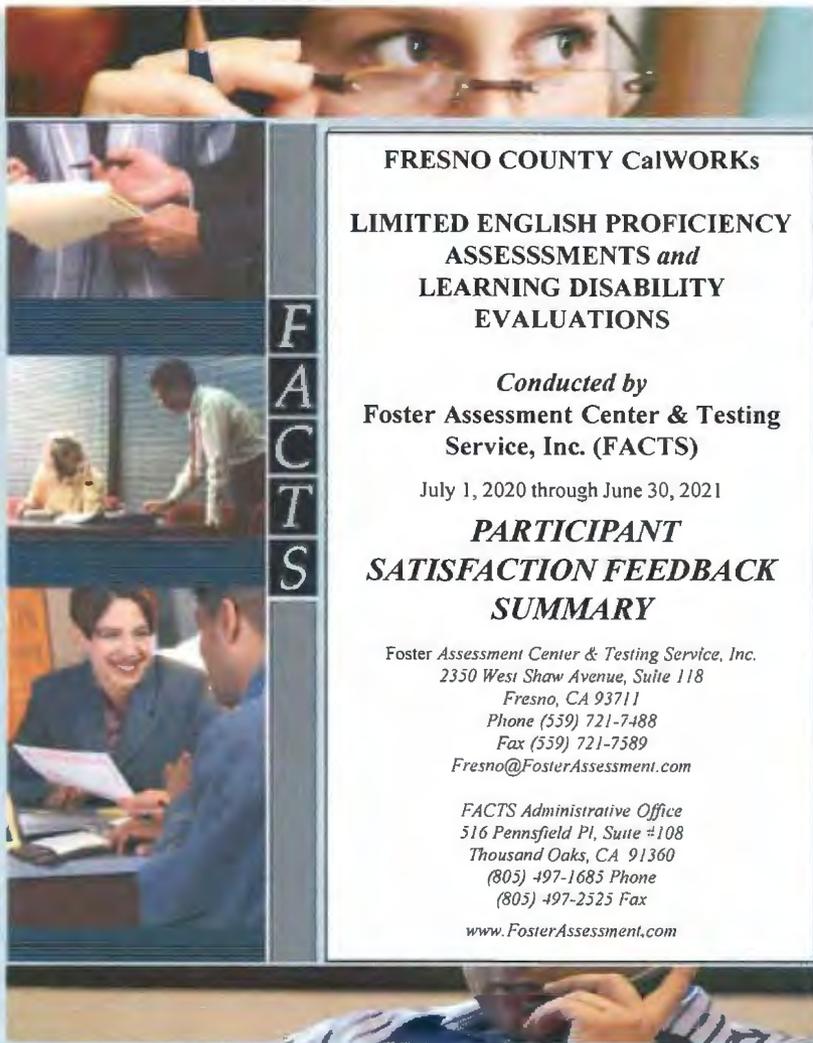
Please return this questionnaire either by fax (805) 497-2525, mail or email via the green "submit" button below.  
Foster Assessment Center & Testing Service, Inc.  
516 Pennsfield Place, Suite #108  
Thousand Oaks, CA 91300  
Attn: Andrea Foster, M.A., A.B.V.E., C.V.E., P.V.E., Director of Services  
AndreaFoster@FosterAssessment.com

Thank you for your time. We appreciate your comments.

DL F8 Unit WLB

# Annual Satisfaction Feedback Summary Report

43



**F**  
**A**  
**C**  
**T**  
**S**

**FRESNO COUNTY CalWORKs**

**LIMITED ENGLISH PROFICIENCY  
ASSESSMENTS and  
LEARNING DISABILITY  
EVALUATIONS**

*Conducted by*  
**Foster Assessment Center & Testing  
Service, Inc. (FACTS)**

July 1, 2020 through June 30, 2021

**PARTICIPANT  
SATISFACTION FEEDBACK  
SUMMARY**

*Foster Assessment Center & Testing Service, Inc.  
2350 West Shaw Avenue, Suite 118  
Fresno, CA 93711  
Phone (559) 721-7488  
Fax (559) 721-7589  
Fresno@FosterAssessment.com*

*FACTS Administrative Office  
516 Pennsfield Pl, Suite #108  
Thousand Oaks, CA 91360  
(805) 497-1685 Phone  
(805) 497-2525 Fax  
www.FosterAssessment.com*

- Detailed report of feedback provided by participants will be gathered and analyzed (by an outside objective source) and presented to DSS case worker's & management staff annually
- FACTS goal is that 98% of all participants respond that they are satisfied with the results of their assessment

## Feedback Results Thus Far... ...asking “How can we improve our services?”

44

- “Thank you. This is an excellent service. No improvement is needed.”
- “I was so afraid to come to the testing, and now I am so glad I did.”
- “The assessment was very thorough and great. It changed how I think of myself and how to use my skills. I have a plan now.”
- “Everything went well. The staff was very kind.”
- “For me everything went fine. I would not recommend any changes at all to this service.”
- “Thank you for helping me find out about my abilities and how I learn best. This information helped me with my job selection.”
- “Keep great employees like the ones you have! They are really good.”
- “I was worried at first, but this was so valuable!”
- “Thank you for all this help. I so appreciate it.”



# How does the Job Specialist make a referral?

45

REFERRALS



It's simple.

The Job Specialist can refer by entering CalWIN and scheduling the participant according to the appointment availability.



# What does FACTS do once a referral is received?

46

Every Tuesday FACTS receives a roster for the upcoming week from the Office Assistant (OA). Once we receive the roster we:

- ✓ Send out a confirmation letter to the participant, detailing our location, the date and time of their appointment and our phone number (in case they have any questions).
- ✓ Next, we phone the participant to:
  - ✓ remind them of the time and date of their upcoming appointment,
  - ✓ remind them to arrange transportation and childcare,
  - ✓ answer any questions they may have, and
  - ✓ provide reassurance to get them comfortable about the tests they will be taking.

We call and text again the day before the appointment to remind them of the upcoming evaluation and check they have no Covid symptoms.



*The chance that they will no-show decreases if you call them the day before too!*

# Is there something I can hand to the Participant when I schedule them for their assessment?

47

Yes, we have many items that will be helpful to you in explaining the assessment, encouraging the participant to attend, and providing them with testimonials of other participants who have already completed their assessment.

Send an email today to: [Fresno@FosterAssessment.com](mailto:Fresno@FosterAssessment.com)  
or call us at (559) 721-7488

Ask for the handouts from today's FACTS presentation. We will reply, sending them to you!



# QUESTIONS?

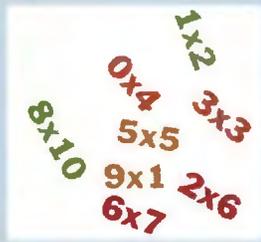


**F**OSTER  
**A**SSASSMENT  
**C**ENTER &  
**T**ESTING  
**S**ERVICE

# Have You Ever Felt Like You Learn Differently than Others?



Have you ever read a paragraph two or three times just to understand it?



Do you have trouble remembering your times tables?

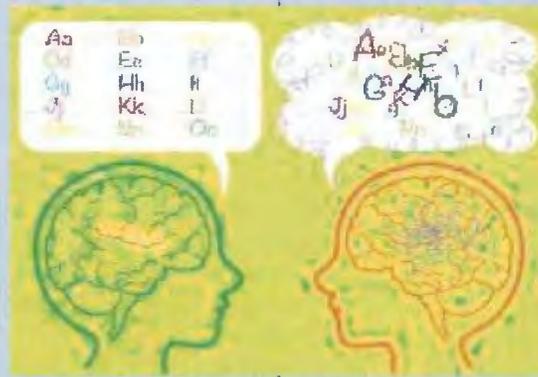
Do you listen in class but still have trouble understanding what is being said?



Do you sometimes forget what you just learned?

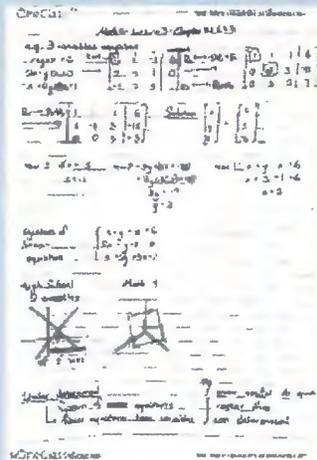
# Do You Struggle with Taking Notes?

Does your teacher say this:



...and you hear this?

Should your notes look like this:



...but you take down this?



## There are other things you may have noticed about yourself:



- Do you have a hard time remembering what was taught?
- Does your attention get less and less as you try to learn?
- Do you have a hard time organizing your work?
- Do you go much slower than others, and miss much of what is being said?
- Is your accuracy off?



Some – or NONE of these – may apply to you:



- Attention problems
- ADHD or ADD
- Dyslexia
- IEP (Individualized Educational Plan) in school
- Special Education Classes
- Teachers helping you after class
- Medication for helping with attention span
- Held back to complete a class
- Dropped your classes because they were too hard
- Fired from work because you couldn't apply yourself

## Some People are Born with a Different Learning Style. It Is Not Your Fault.



Do you have someone in your family – a mother, father, sister, brother, aunt, or uncle that has struggled in school?



*Sometimes, the connections in the brain work differently than others, and this “disconnect” usually runs in families. It is not because you did anything wrong, but is the way you were born – like having brown eyes or blue eyes.*

## How Many People Have Trouble with Learning?



Your trouble with learning may have nothing to do with how smart you are. In fact, it is not even related to your IQ. This common problem affects at least one in every ten individuals, and most people don't even know it. They just know they struggle.

**Facts**

- Not related to IQ
- 10 % of the population
- Usually more than one coexist
- No "cure" but it can be treated
- Found more in boys
- Runs in families



## You Owe It To Yourself to Find Out More



Most people don't know why they struggle, and want to avoid taking any more tests to find out what is happening. They just keep dealing with their learning problems...over and over.



But finally, there is a one day program that can help you, once and for all, find out what is going on.

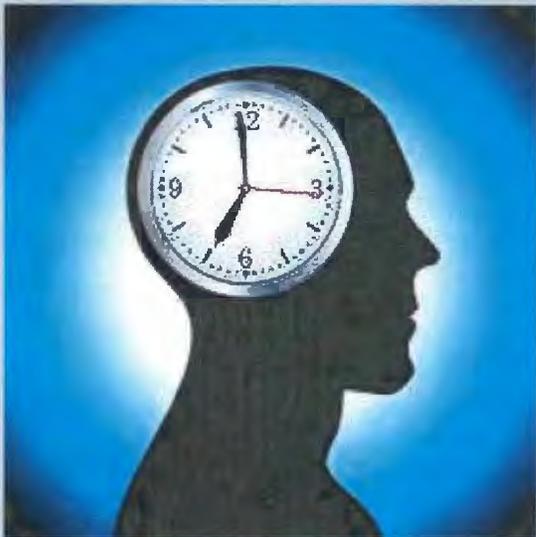


And if you have, or plan to have children, remember they may face these same issues because it runs in families. Solve it for yourself, and help them too.



If you are born with these issues, they will stay with you, and it is time to get help.

- It is not something you will “grow out of” or get better with time.
- This learning issue will always be with you and won't go away if you *just try harder*.
- But there are tools to help you overcome it.

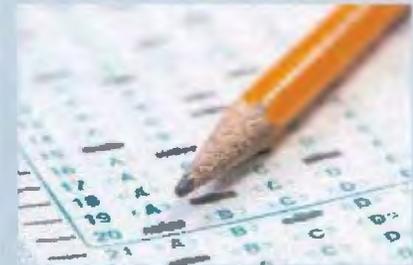


*Sometimes, you need to be your best advocate, and get the help you need. And it is better to do it sooner than later.*

You may be saying: “That sounds like me. But what can I do? And do I even want to deal with this?”



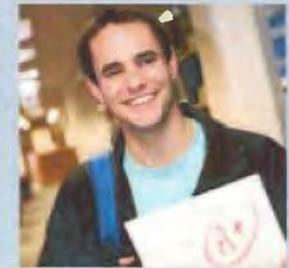
- Since you have struggled in school, you may think taking more tests to learn about yourself is the *last thing* you want to do.
- You may not want to face this issue, and feel like it is best to just drop your classes, or just take that lower level job.
- You may think you are already too busy and just don't have the time.



# We are here to help.



- In one day, for free, we can find out how you learn best, and which accommodations may work for you.
- You will take questionnaires and short tests to find out how you learn best. It is an evaluation you **cannot fail** because it is about you. You do not need to study for this evaluation – you just need to try your best.
- If your results indicate you qualify, you will be allowed to use accommodations in your courses, even during tests and quizzes.
- You can also use accommodations in your workplace to be more productive and increase your chances for promotions.





# There are Many Different Types of Accommodations



- Use of a calculator
- Use of a tape recorder for educational programs, testing or training
- Use of spell check
- Use of books on tape (audio books)
- Assistance with written work, forms, and/or applications
- Additional time for testing, quizzes, educational services, and/or learning new information
- Utilization of a Temporary Job Coach for initial stages of training
- Tutoring for educational programs
- Use of a note taker



## Help Is Right Here in Fresno



We are nice, kind, explain things well,  
and are here to help.

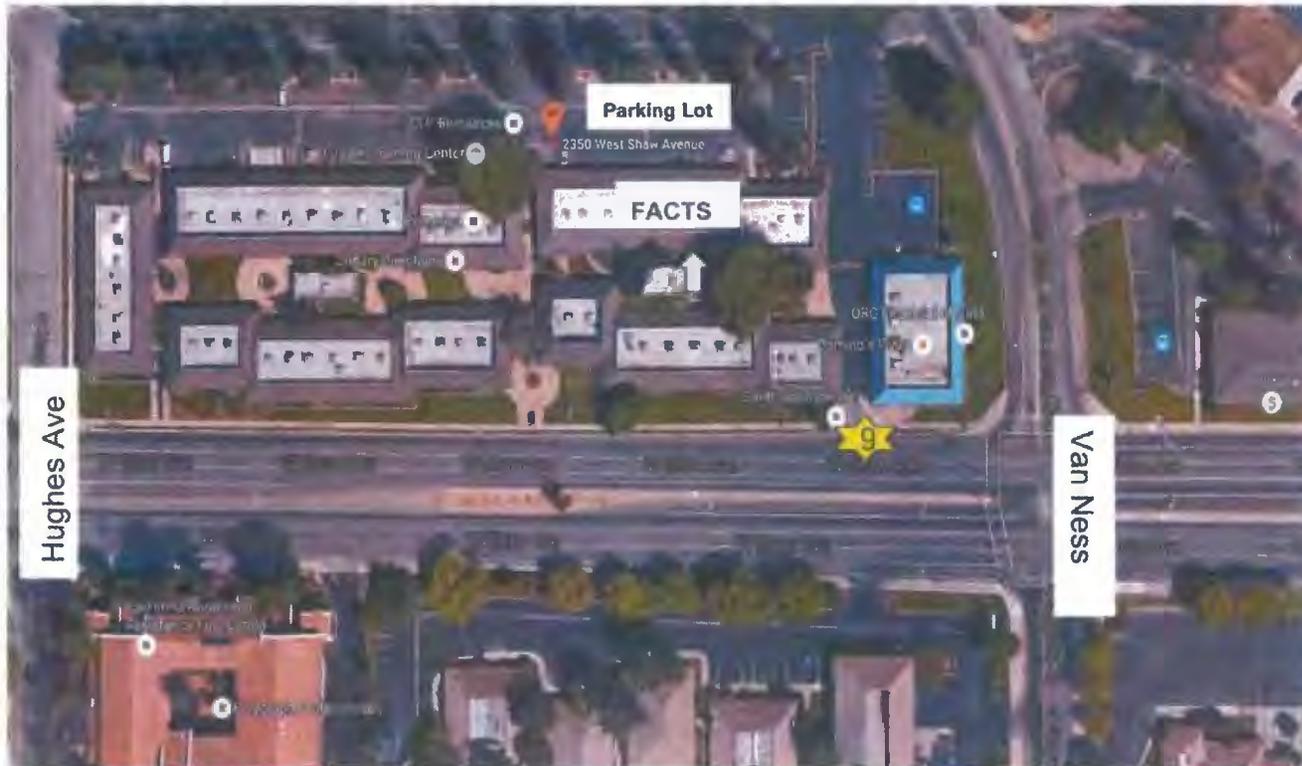


# Let's take a look at the FACTS Fresno Center



Entrance to Reception Area

Foster Assessment Center & Testing Service, Inc.  
(FACTS)  
2350 West Shaw Ave., Suite #118  
Fresno, CA 93711



 Bus stop location

For Assistance, please call  
(559)721-7488

We will send you a map on where to go and how to get here.



Reception Area



Large, Quiet Testing Areas



Large Conference Room

When you finish the day, we will sit down with you, show you all your scores, tell you how you learn best, and let you know if you qualify for accommodations.



We can provide you with paperwork that you can give to your school or employer to get the help you need.

## What does almost everyone say once they have completed this evaluation?



- ❖ “Thank you. This is an excellent service.”
- ❖ “I was afraid to come to the testing, and now I am so glad I did.”
- ❖ “This changed how I think of myself and how to use my skills. I have a plan now.”
- ❖ “Thank you for helping me find out about my abilities and how I learn best. This information helped me with my job selection.”
- ❖ “Keep the good employees like the ones you have! They are great!”
- ❖ “Now I understand why I was struggling, and now I know what to do.”
- ❖ “Everything went well. The staff was so kind.”
- ❖ “I was worried at first, but this was so valuable!”
- ❖ “Thank you for all this help. I so appreciate it.”
- ❖ “I cannot believe I almost missed this opportunity.”



# How do I get help?



*It's simple.*

Call or talk to your Job Specialist today, and ask to be scheduled for a free Learning Style Evaluation.

They can help with childcare and transportation.

Do it today. Do it for you.



# QUESTIONS?



## STATEMENT OF QUALIFICATIONS

### Andrea Foster

Foster Assessment Center & Testing Service, Inc.  
516 Pennsfield Place, Suite #108  
Thousand Oaks, CA 91360  
(805) 497-1685 Fax: (805) 497-2525

### CERTIFICATIONS

**P.V.E.**, Professional Vocational Evaluator, Registry of Professional Vocational Evaluators, Menomonie, Wisconsin, 2011 to present, Certificate #00041.

**C.V.E.**, Certified Vocational Evaluator, Commission on Certification of Work Adjustment and Vocational Evaluation Specialists, Rolling Meadows, Illinois, 1986 to present, Certificate #00057831.

**I.C.V.E.**, International Certified Vocational Evaluator, College of Vocational Rehabilitation Professionals (CVRP), 4 Catarqui Street, Kingston, Ontario, Canada, 2020 to present, Certificate #1215.

**C.W.A.**, Certified Work Adjustment Specialist, Commission on Certification of Work Adjustment and Vocational Evaluation Specialists, Rolling Meadows, Illinois, 1986 to present, Certificate #00667.

**A.B.V.E.**, American Board of Vocational Experts, Diplomate, Glenview, Illinois, 1990 to present, Certificate #181668.

**I.P.E.C.**, International Psychometric Evaluation Certification, Santa Cruz, CA, 2015 to present, Certification #179.

American Rehabilitation Economics Association, Sherman Oaks, CA 1994 to present, #0051.

American Board of Pain Management, Fellow, Modesto, California, 1992 to present, Certificate #5163.

American Board of Disability Analysts, Diplomate, Nashville, Tennessee, 1996 to present, Certificate #2358.

### EDUCATION

M.A., Human Resources Management, Counseling Emphasis, Pepperdine University, Malibu, California, 1979.

B.A., Psychology, University of California at Santa Barbara, Santa Barbara, California, 1975.

### EXPERIENCE

January, 1984 through Present – **C.E.O./Certified Vocational Evaluator/Professional Vocational Evaluator/Assessor**, Foster Assessment Center & Testing Service, Inc. Directs and supervises a staff of approximately 40 individuals at eight evaluation locations (including Anaheim, Bakersfield, Fresno, Long Beach, Los Angeles, Palmdale, Northridge and Thousand Oaks). Select, train and supervise hired vocational evaluation staff for the areas of work evaluation and assessment, learning disability evaluations, situational assessment, psychometric assessment, functional capacity evaluations and hand evaluations. Duties include evaluation of clients, report writing/reviewing, addition of new testing instruments and contract coordination. Experience includes oversight of CalWORKs/GAIN LDE and vocational assessments and WIOA assessment services. Involved in the extensive evaluation for the private sector rehabilitation, and the California State Department of Rehabilitation. Personal injury expert testimony.

May, 1982 through December 1983 - **Vocational Evaluator/Lead Vocational Supervisor**, Northridge Hospital Work Evaluation Center. Performed vocational evaluations for industrially injured clientele, coordinated hand and spinal injury programs for individuals. Assisted in medical review panel discussions on individual patients referred for assessment.

October, 1979 through May, 1982 - **Vocational Evaluator/Supervising Vocational Evaluator**, Career Guidance Center, Provo, Utah. Performed vocational evaluation and counseling for AFDC recipients. Supervised a staff of five professionals and worked with Placement Specialists from state Job Service.

### **SEMINARS, WORKSHOPS, INDIVIDUALIZED TRAINING**

American Board of Vocational Experts (ABVE): Various presentations nationwide, 1990 to present.

American Rehabilitation Economics Association (AREA): Various presentations nationwide, 1994 to present.

International Association of Rehabilitation Professionals (IARP): Various presentations nationwide, 1990 to present.

Vocational Evaluation and Career Assessment Professionals Association (VECAP): Various presentations nationwide, 1990 to present.

**“Woodcock-Johnson IV Training: Achievement Battery”**, Downey, CA, Los Angeles County GAIN Vocational Assessment Program, presenter – Dr. Michael Hass, Chapman University (March 3, 2019).

**“CalWORKs 2.0 – Goal Oriented Service Delivery System,”** Thousand Oaks, CA, Justin Kaaiakamanu, MSW, PVE, IPEC, (March, 2019).

**“CalWORKs Monitoring Updates and Procedures,”** Ana Lopez, Los Angeles County Office of Education, Thousand Oaks, CA (September, 2018).

**“Active Shooter Situations – Preparedness and Awareness,”** Katie Foster, MA, Thousand Oaks, CA (December, 2018).

**“How to Recognize the Need for a Learning Disability Evaluation Referral,”** Drew Paine, MA, PVE, CSP, IPEC, Thousand Oaks, CA (September 2018).

**“Consistency in Computer Security Protocol,”** Marc Leeka, Computer Physicians, Thousand Oaks, CA (May 2017).

**“Evaluation Techniques when Dealing with Difficult and Aggressive Clients,”** Craig Houston, MS and Justin Kaaiakamanu, MSW, PVE, IPEC, Los Angeles, CA (March 2016).

**“Attention Deficit Hyperactivity Disorder and the DSM 5,”** Los Angeles, CA, Karen Atwater, MSW, (March, 2014).

**“Critique and Comments on the Strong Interest Inventory, Raven Standard Progressive Matrices and Adult Basic Learning Examination (ABLE)”**, Los Angeles, CA, Craig Houston, MS, (March, 2014)

**“Barrier Screening Training, Including Domestic Violence, Substance Abuse and Mental Health Issues,”** Los Angeles, CA, Elizabeth Hernandez, CVE, PVE, (September, 2013).

**“Understanding and Utilizing the Myers Briggs Type Indicator,”** Los Angeles, CA, Sonya Louthan, (September, 2013).

**“Vocational Guidance, Test Review, Labor Market Review, Goal Selection and Employment Plan Development Process,”** Reseda, CA, George North, MS, CRC, (March, 2013).

**“Depositions and Court Testimony – Expect the Unexpected,”** Los Angeles, CA, Elizabeth Hernandez, CVE, PVE, OBCS, (November, 2012).

**“Mistakes Made When Dealing with Difficult, Aggressive and Overbearing Clients,”** Reseda, CA, Justin Kaaiakamanu, MSW, PVE, (October, 2012).

**“Effectively Generating Employment Plans,”** Downey, CA, Craig Foster, CVE, PVE, (September, 2012).

**“Review of Southern California Demand List,”** Los Angeles, CA, Craig Foster, CVE, PVE, (March, 2012).

**“On Site and Off Site Safety Procedures for Clients, Consumers and Participants,”** Long Beach, CA, presenters – Drew Paine, MA, Imelda Flores, MS and Karen Atwater, MS (May, 2012).

**“Developing Skills to Aid Your Low Vision Participants,”** Thousand Oaks, CA, Elizabeth Hernandez, PVE, CVE (November, 2011).

**“Safety Net CPR and First Aid Training and Certification,”** Thousand Oaks, CA, Robert Jordan, Certified EMT (November, 2011).

**“Vocational Evaluation Philosophy and Process,”** Long Beach, CA, Randy McCauley, Los Angeles Office of Education (August, 2011).

**“Department of Labor Unprepared Injured Workers,”** Los Angeles, CA, Justin Kaaiakamanu, MSW, (May, 2011).

**“Adherence to Ethical and Legal Principles and Practices,”** Reseda, CA, Bethlehem Tamerat, MA, (March, 2011).

**“Child and Elder Abuse: Legal Parameters and Notification Procedures,”** Downey, CA, presenter - Los Angeles County, Department of Public Social Services,” (November, 2010).

**“Learning Disability Testing Protocols and Measurements,”** Los Angeles, CA, presenter – George Stevens, C.V.E., (April 29, 2005).

**“Learning Disability Evaluations at Community Colleges,”** Los Angeles, CA, presenter – Bryon Ouchi, MA, Learning Disability Specialist, Fullerton Community College, (October, 2003).

**“Case Studies of CalWORKs Learning Disability Evaluators throughout Southern California,”** Long Beach, CA, (July 11, 2003).

**“Learning Disability Evaluation Test Selection and Determination of Request for CalWORKs LD Diagnosis,”** Thousand Oaks, CA, presenter – George Stevens, C.V.E., (April 11, 2003).

**“Rehabilitation Economics,”** San Diego, California, presenter – Robert Metcalf, Ph.D., San Diego Institute, 1989.

**“Behavioral Observations, Documentation, and Evaluation technique”**, Stout State University, Menomonie, Wisconsin, 1984.

**Workers' Compensation Law**, IEA, Los Angeles, California, Bureau Consultant, Certification, 1984.

**Use and standardization of the Dictionary of Occupational Titles (DOT), Occupational Outlook Handbook (OOH), the Classification of Jobs According to Worker Trait Factors, and the Occupational Informational Network (O\*NET)** in addition to extensive training in the interpretation, analysis and documentation of most psychometrics available within the state of California, 1979 through present.

## INSTRUCTIONAL CAPACITY, HONORS, VOTED POSITIONS

Quarterly instructor for a staff of approximately 40 professional vocational evaluators and vocational technicians at all-day quarterly training sessions involving Learning Disabilities, Assessment and Evaluation of Clients, Interpretation of Testing Instruments, and Comprehensive Report Writing, 2001 to present.

**“Policy on Comprehensive Vocational Evaluation Services,”** Thousand Oaks, CA, presenter – Andrea Foster (March 2019).

**“Determination of Feasibility in Relation to Competitive Integrated Employment,”** Thousand Oaks, CA, presenter – Andrea Foster and Justin Kaaiakamanu (December, 2018).

**“Current Issues with Subpoenaed Testimony and Issuing Reports,”** Los Angeles, CA, presenter – Andrea Foster, (September 2018).

**“Sexual Harassment and Bullying in the Workplace,”** Los Angeles, CA, presenter – Andrea Foster, (June, 2018).

**“Reynolds Adaptable Intelligence Test – Nonverbal,”** Los Angeles, CA, presenter – Andre Foster, (March, 2017).

**“Adherence to California’s Mandated Personnel Policies,”** Reseda, CA, presenter – Andre Foster, (November 2016).

**“Accreditation and Results Management Recommendations,”** Reseda, CA, presenter – Andrea Foster, (December, 2013).

**“Accessibility and Healthy Ergonomics,”** Los Angeles, CA, presenter – Andrea Foster, (September, 2013).

**“Consistency in Recommendation of Employment Goals,”** Los Angeles, CA, Downey, CA, presenter – Andrea Foster (June, 2013).

**“Comparison of the Raven Standard Progressive Matrices to the Revised Beta III,”** Los Angeles, CA, presenter – Andrea Foster, (June, 2013).

**“Use of the Dictionary of Occupational Titles (DOT) to Determine Required Academic Grade Levels,”** presenter – Andrea Foster, (March, 2013).

**“PVE, CVE, CWA and CRC – The Importance of Maintaining Your Credentialing,”** Reseda, CA presenter – Andrea Foster, (October, 2012).

**“Understanding Disabilities: Protocols for Deaf and Visually Impaired Evaluations,”** Long Beach, CA, presenter – Andrea Foster, (August, 2011).

**“Diversity and Cultural Awareness within the Evaluation Process,”** Los Angeles, CA, presenter – Andrea Foster, (December, 2010).

**“Ethical Standards via Vocational and Career Assessment Professional (VECAP),”** Long Beach, CA, presenter – Andrea Foster, (May, 2012).

**“Child and Elder Abuse: Legal Parameters and Notification Procedures,”** Downey, CA, presenter – Andrea Foster, (December, 2010).

**“Mental Disorders: Signs, Symptoms and Causes,”** Reseda, CA, presenter – Andrea Foster, (June 2, 2010).

**“Learning Disability Evaluation Procedures and Effective Use of Woodcock-Johnson III Test Materials”,** Los Angeles, CA, presenter – Andrea Foster, (October 17, 2008).

**“Effective Use of the Occupational Outlook Handbook (OOH),”** Reseda, CA, presenter – Andrea Foster, (June, 2010).

**“Mental Disorders: Signs, Symptoms and Causes,”** Reseda, CA, presenter – Andrea Foster, (June, 2010).

**“Ethics and Professionalism in the Workforce,”** Los Angeles, CA, presenter – Andrea Foster, (March, 2010).

**“Grievance Procedures and Complaints: Handling Effective Changes,”** Anaheim, CA, presenter – Andrea Foster, (February, 2009).

**“Learning Disability Evaluation Procedures and Effective Use of Woodcock-Johnson III Test Materials”**, Los Angeles, CA, presenter – Andrea Foster (October, 2008).

**“Maslow and the Struggle for Self Sufficiency,”** Reseda, CA, presenter – Andrea Foster, (March, 2008).

**“HIPAA: Protection of Client Confidentiality,”** Long Beach, CA, presenter – Andrea Foster, (July, 2007).

**“Determination of Learning Disability Status: (a) Review of our role in LD Evaluations (b) Testing procedures and Test interpretation and (c) Reasonable Accommodations/Report Writing Questions”**, Long Beach, CA, presenter – Andrea Foster, (July, 2007)

**“Resources for Functional Capacity Evaluations,”** Reseda, CA, presenter – Andrea Foster, (January, 2006).

**“DOT to O\*NET: Use and Abuse of DOT, eDOT and O\*NET”**, Reseda, CA, presenter - Andrea Foster, (January 2005).

**“Expert Witness Strategies: Testimony v. Deposition”**, Los Angeles, CA, presenter - Andrea Foster, (October, 2004).

**“Learning Disability Protocols: Appropriate Test Selection, Definitions of Test Ranges, Determination of Need for Diagnosis,”** Thousand Oaks, CA, presenter – Andrea Foster, (April, 2003).

**"Learning Disability Instruments and Tests: Woodcock-Johnson III, TONI 3, Raven Standard Progressive Matrices, BETA III, Personal Tests for Industry – Oral, Thurstone Test of Mental Alertness"**, Los Angeles, CA, presenter – Andrea Foster, (October, 2002).

**"Comprehensiveness of Learning Disability Report Writing,"** Los Angeles, CA (October, 2002).

**"Procedures and Efficiency of Learning Disability Evaluation Procedures,"** Los Angeles, CA presenter – Andrea Foster, (October, 2002).

**"Substance Abuse: Facilitating the Client’s Journey to Productive Work,"** Ventura, CA (September, 2002).

**"Traumatic Brain Injuries, Learning Disabilities and Functional Limitations,"** Long Beach, CA, (July, 2002).

National Vocational Evaluator, Standard Compliance and Review Board, 1990 through 1994, National Association of Rehabilitation Professionals in the Private Sector.

Moderator, coordinator for Ventura County Rehabilitation Association, involving monthly/quarterly speaking engagements for up to 100 attendees, 1989 to 2000.

Speaker for the California Association of Rehabilitation & Reemployment Professionals, Oxnard, California, April 25, 2002, "Legislative Changes Concerning the Settlement of California Rehabilitation Rights."

Speaker for the Southern California Rehabilitation Exchange, Santa Barbara, California, April 30, 1992, "Work Evaluations - Saving Carrier Dollars."

California Association of Rehabilitation Professionals, Santa Barbara, California, October 18, 1988, speech on Efficiency in Evaluation - Maximizing Results.

Plus approximately 250 alternate speeches to various groups on Pain Management, Effective Evaluation, Conducting Assessments, and/or Psychometric Interpretations.

### **MEMBERSHIP**

International Association of Rehabilitation Professionals (IARP)  
Vocational Evaluation and Career Assessment Professionals (VECAP)  
American Board of Vocational Experts (ABVE)  
American Rehabilitation Economics Association (AREA)  
American Academy of Pain Management (AAPM)

# Curriculum Vitae

of

## **Katie Foster**

Foster Assessment Center & Testing Service, Inc.  
516 Pennsfield Place, Suite #108  
Thousand Oaks, CA 91360  
(805) 497-1685 Fax: (805) 497-2525

### **Education**

University of the Rockies, Denver, Colorado  
*Masters in Psychology, Emphasis in Career Management and Counseling, August, 2018*

California Lutheran University, Thousand Oaks, California  
*Bachelors of Art, Psychology, May 2014*

### **Work Experience**

---

#### **Foster Assessment Center & Testing Service, Inc.**

*Chief Operating Officer, Vocational Evaluator, Staff Development Specialist*

Thousand Oaks, CA  
December 2014 – Present

- Administer and interpret tests, provide career counseling, make behavioral observations, identify transferable skills and provide analysis, develop employment plans for CalWORKs Welfare to Work recipients, Workers Compensation clientele, Department of Rehabilitation consumers and Department of Labor clientele.
- Coordinate and evaluate physical capacity, academic ability and/or tolerance, identify work adjustment, and perform functional capacity evaluations. Conduct review of medical records, initial interviews, orientations, and exit conferences with counselors, attorneys, insurance representatives and injured workers.
- Observe and record behavior patterns of the client's physical tolerances, worker traits, skill levels, aptitudes and vocational interests.
- Identify potential employment barriers relating to academic achievement, medical issues, mental health issues, domestic violence, substance abuse, legal issues and transportation issues.
- Generate reports for each referral, identifying all pertinent data and answering all referral questions.
- Accomplished in compilation and generation of statistical information regarding no-show rates, recommended activities, learning disability status, referral rates and recommended educational/vocational training.
- Experienced in public speaking across eight Southern California counties regarding evaluation and assessment services.
- Knowledgeable in marketing practices, site visits and interfacing with potential referral sources.
- Skilled in recruitment, interviewing and hiring staff across Southern California.
- Competent in general HR practices including preparing payroll, implementing employee benefits, maintaining policies and records, and handling employee concerns.
- Oversee staff quality assurance monitoring, review assessment and work evaluation reports, manage corporate compliance issues and oversee contract implementation.
- Responsible for coordinating, implementing and presenting at quarterly Evaluator and Technician staff trainings.
- Proficient in using Microsoft Word, Access, Excel, Office, Publisher and PowerPoint.

**Foster Assessment Center & Testing Service, Inc.**  
*Vocational Testing Technician*

Reseda, CA  
August 2010 – November 2014

- Administer, score and interpret over 100 psychometric tests and numerous work samples, including JEVS, Valpar and Tower hands-on tests, including learning disability evaluations and vocational assessments
- Provide participants with educational planning and career exploration related information
- Document physical tolerances and behavioral observations for referrals from the Department of Rehabilitation, Workers Compensation, Department of Labor and CalWORKs Welfare to Work.

**Foster Assessment Center & Testing Service, Inc.**  
*RFP Collaborator/Writer*

Thousand Oaks, CA  
November 2010 – Present

- Gather pertinent information for various Request for Proposals, organize in an effective manner, and generate extensive responses for Department of Public Social Services and Human Service Agencies.
- Input data, collate, bind, generate pictorial information and deliver RFP's in a timely manner.

**Foster Assessment Center & Testing Service, Inc.**  
*Office Manager, Operations Coordinator*

Thousand Oaks, CA  
August 2008 – August 2010

- Assist Directors with incoming referrals, report generation, follow-up marketing, training presentations, coordination of staff quarterly training and CARF accreditation preparation.

**Foster Assessment Center & Testing Service, Inc.**  
*Clerical Assistant*

Palmdale, CA  
January 2006 – August 2008

- Assist with processing invoices, correspondence, faxing, data processing, past due collection and other clerical duties

### **Specialized Training/Conference Attendance**

---

“County of Los Angeles Department of Public Social Services Civil Rights Training for Contract Staff,” by Marlene Smith, DPSS Academy Director, Downey, California March 22, 2019.

“Woodcock-Johnson IV Training: Achievement Battery”, Downey, CA, Los Angeles County GAIN Vocational Assessment Program, presenter – Dr. Michael Hass, Chapman University (March 3, 2019).

International Association of Rehabilitation Professionals 2017 California Chapter Professional Seminar, Newport Beach, California, June 24, 2017

International Association of Rehabilitation Professionals Annual Conference, San Diego, California, November 6-8, 2014.

“Integrating the Discovery Process with Vocational Evaluation/Career Assessment Services,” by Liz Jones, M.A., C.V.E., P.V.E., October 16, 2014

International Association of Rehabilitation Professionals 2014 California and Nevada Chapters Joint Professional Seminar, Las Vegas, Nevada, February 7-8, 2014

### **Staff Development Instructional Capacity**

---

“Determining the Need for a Learning Disability Evaluation Referral,” – Training for 50 Ventura County Human Services Agency Employment Specialists, March 21, 2019.

“Policy Training and Procedures for Specialized Vocational Assessment Services,” – Training for 500 Fresno County Department of Social Services Upper Management Contract Staff Members and Job Specialists, 2016-2019.

“Determining the Need for a Learning Disability Evaluation Referral,” – Training for 50 Ventura County Human Services Agency Employment Specialists, July 14, 2016.

“Community Rehabilitation Providers Fraud, Waste, and Abuse Training,” – FACTS Vocational Evaluator Training Reseda, California, June 8, 2018.

“Learning Disability Evaluations – Definitions and Referral Processes after OCAT,” – Training for over 500 Riverside County Department of Public Social Services Upper Management Contract Staff Members and Case Managers – March 2016.

“Policy on Comprehensive Vocational Evaluation Services,” – FACTS Vocational Evaluator Training, Los Angeles, California, March 16, 2016.

“Mental Health First Aid Training,” – FACTS Vocational Evaluator Training, Reseda, California, December 7, 2015.

“Online CalWORKs Appraisal Tool – Understanding the New Intake Process,” – FACTS Vocational Evaluator Training, Reseda, California, December 7, 2015.

“Meeting Legal Report Standards,” – FACTS Vocational Evaluator Training, Reseda, California, May 13, 2015.

“Policy Training and Procedures for Learning Disability Evaluations,” – Training for 380 Riverside County Department of Public Social Services Employment Services Case Managers, Contract Analysts and Staff Development Trainers, March 2015.

### **Professional Memberships / Affiliations**

---

International Association of Rehabilitation Professionals (IARP) #5853560

National Career Development Association (NCDA) #197343

Vocational Evaluation and Career Assessment Professionals (VECAP) #15010

National Alliance on Mental Illness (NAMI)

National Council for Behavioral Health (NCBH)

Curriculum Vitae  
*of*  
**Esmeralda Apresa**  
***Foster Assessment Center & Testing Service, Inc.***  
2350 West Shaw Avenue, Suite 118, Fresno, CA 93711  
(559) 721-7488 FAX (559) 721-7589

**EDUCATION**

National University, MA, Human Behavior Psychology, June, 2022.  
California State University Fresno, BA Degree, Psychology, September, 2020.

**PROFESSIONAL EXPERIENCE**

**Foster Assessment Center & Testing Service, Fresno, CA**

*Director*

*July 2021 – Present*

- Provide oversight and direction to all staff, referred participants and referring sources in regards to the operations of the center.
- Perform Limited English Proficiency and Learning Disability Evaluation services, including reviewing all LEP/LDE services performed by other Fresno staff.
- Provide and remain up to date on all duties of Secretary, Vocational Assessor, Vocational Evaluator and Director, including all services for CalWORKs participants.
- Provide current and regularly scheduled presentations via JobWISE to participants and referring sources.

**Foster Assessment Center & Testing Service, Fresno, CA**

*Vocational Assessor/Evaluator*

*July 2019 – July 2021*

- Test administration and interpretation, career guidance, behavioral observations, transferable skills identification, and employment development plans for Department of Rehabilitation, Workers Compensation, and CalWORKs.
- Coordinate and evaluate physical capacity, academic ability and/or tolerance and work adjustment evaluations. Conduct review of medical records, initial interviews, orientations, and exit conferences with counselors, attorneys, insurance representatives and injured workers.
- Test administration, career counseling, behavioral observations, transferable skills analysis, and employment plans for CalWORKs participants.
- Evaluate participant work history, academic ability, transferable skills, identify employment barriers, and analyze aptitudes. Conduct testing and test interpretation, conduct interviews, orientations, and Employment Planning Conferences with participants.
- Provide well documented Vocational Assessments and Learning Disability Evaluation reports.
- Identify learning disabilities and reasonable accommodations.

**Foster Assessment Center & Testing Service, Fresno, CA**

*Secretary/Vocational Technician*

*June 2016 – July 2019*

- Provide vocational evaluation test administration and scoring services for CalWORKs participants.
- Coordinate and present training seminars for Job Specialists and FACTS Technician Staff.

- Assess clients' physical tolerances, endurance, cognitive processing levels, aptitudes and skills.
- Implement work site modifications to broaden employability opportunities.
- Administer wide variety of academic, aptitude, and skill tests.
- Score and record test results for participant files.
- Document observational details concerning physical movements, reported pain, and objective work production.

**California Teaching Fellows Foundation**

*August 2013 – June 2016*

*Multi-Subject Tutor*

- Recruit and determine eligibility of students that meet criteria to be part of a program
- Provide assistance to students in different subjects according to California Standards
- Create designs and implement exercises and activities to facilitate student's academic improvement
- Maintain all records required to document student's attendance and academic progress
- Skill in both verbal and written communication
- Have a positive and enthusiastic attitude

**SUMMARY OF SKILLS**

- Highly knowledgeable to requirements of the CalWORKs program
- Track record of working effectively with collaborators within the County of Fresno
- Current provider of JobWISE presentations to Fresno County
- Bilingual-speak, read and write English and Spanish fluently
- Highly organized and dedicated
- Enjoy working as a team member as well as independently
- Updating information or records
- Effectively multi-tasker
- Microsoft Office programs knowledge (Word, Excel, and Power Point)
- Excellent verbal and written communication skills

**SPECIALIZED TRAINING**

Attended numerous company-wide trainings, including but not limited to:

- ✓ Fraud, Waste & Abuse;
- ✓ Sexual Harassment;
- ✓ Mental Health/First Aid;
- ✓ Fire Suppression;
- ✓ Safety Policies and Procedures;
- ✓ Safety Manual Review (Heart Attack, Active Shooter, Seizure Disorders, CPR, Stop the Bleed)
- ✓ Autism Spectrum Disorder;
- ✓ Drug Abuse and Observable Behaviors;
- ✓ Civil Rights;
- ✓ Privacy and Confidentiality Procedures; and
- ✓ Diversity and Cultural Awareness.

Curriculum Vitae of  
**Silvia Lopez**  
Foster Assessment Center & Testing Service, Inc.  
2350 West Shaw Avenue, Suite #118  
Fresno, CA 93711  
(559) 721-7488 Fax: (559) 721-7589

## **EDUCATION**

---

**California State University, Fresno (Fresno State)**  
**Bachelor of Arts, Sociology, *Conferred December 2020***

**Relevant Coursework:** Counseling Techniques, Social Work, Personality Adjustment, Spanish Communications, Critical Theory Gender Issues

## **WORK EXPERIENCE**

---

***Vocational Assessor/Evaluator***                      **Foster Assessment Center & Testing Service, Inc. (FACTS)**  
Fresno, CA  
July 2021 to Present

- Conduct over Limited English Proficient vocational assessments and Learning Disability Evaluations for DSS CalWORKs participants in Fresno County.
- Present and assist in training DSS staff both in person and virtually as requested by Fresno County
- Test administration and interpretation, career guidance, behavioral observations, transferable skills identification, and employment development plans for CalWORKs.
- Coordinate and evaluate physical capacity, academic ability and/or tolerance and work adjustment evaluations. Conduct review of medical records, initial interviews, orientations, and exit conferences with counselors, attorneys, insurance representatives and injured workers.
- Test administration, career counseling, behavioral observations, transferable skills analysis, and employment plans for CalWORKs participants.
- Evaluate participant work history, academic ability, transferable skills, identify employment barriers, and analyze aptitudes. Conduct testing and test interpretation, conduct interviews, orientations, and Employment Planning Conferences with participants.
- Provide well documented Limited English Proficiency Assessments and Learning Disability Evaluation reports.
- Identify learning disabilities and reasonable accommodations.

- Supervise large, medium and small groups of children's performances
- Maintain student records and evaluate student progress
- Work alongside District Administrator to develop curriculum
- Maintain professional relationships with administrators and staff
- Participate in district-wide staff development

### **SUMMARY OF SKILLS**

- Experience in presentations and training of DSS Fresno County staff
- Bilingual-speak, read and write English and Spanish fluently
- Highly organized and dedicated
- Knowledgeable of all aspects of referral process for both LEP and LDE
- Knowledgeable of CalWORKs invoicing and submission of monthly documents
- Knowledgeable of statistical calculations of all referred CalWORKs participants
- Updating statistical outcomes for all reports, including LD/ID identifications
- Enjoy working as a team member as well as independently
- Updating information or records
- Effectively multi-tasker
- Microsoft Office programs knowledge (Word, Excel, and Power Point)
- Excellent verbal and written communication skills
- Experience in successful management of diverse groups of people

*Resume of*  
**GEORGE R. NORTH, M.S.**

*Foster Assessment Center & Testing Service, Inc.*  
*1605 West Olympic Blvd., Suite #509*  
*Los Angeles, CA 90015*  
*(213) 353-0782 Fax: (213) 353-0792*

**EDUCATION**

California State University Los Angeles 1996  
**Masters of Science Degree in Counseling**

University of the State of New York 1986  
**Bachelor of Science in Business Management**

**P.V.E.**, Professional Vocational Evaluator, Registry of Professional Vocational Evaluators, Menomonie, WI, 2016 to present, Certificate #00203

**I.P.E.C.**, International Psychometric Evaluation Certification, Santa Cruz, CA, 2018 to present, Certification #40114.

**WORK HISTORY**

*Foster Assessment Center & Testing Service, Inc.* Los Angeles County and Riverside County  
**Vocational Assessor & Learning Disability Evaluator** 2006 to present

*Gentiva Rehabilitation Without Walls* West Covina, California  
**Admissions Manager** 2005 – 2006

*Career Options* Los Angeles, California  
**Senior Vocational Rehabilitation Counselor** 2002 – 2005

*REGAIN* Norwalk, California  
**Vocational Rehabilitation Counseling** 1987 – 2002

*Goldstein Wither* Los Angeles, California  
**Operations Manager** 1980 – 1987

**SPECIALIZED VOCATIONAL ASSESSMENT & LEARNING DISABILITY  
EVALUATION TRAINING**

**“Policy on the Quality of Individualized Services”** FACTS Vocational Evaluator Training, Thousand Oaks, CA, Katie Foster, MA (December, 2018).

**“Woodcock-Johnson IV Training: Achievement Battery”**, Downey, CA, Los Angeles County GAIN Vocational Assessment Program, presenter – Dr. Michael Hass, Chapman University (March 3, 2019).

**“Translation Services for Non-English and Non-Spanish Speaking Participants”** FACTS Vocational Evaluator Training, Los Angeles, CA, Josean Rodriguez, MS (December, 2017).

**“Diversity and Cultural Awareness Training,”** FACTS Vocational Evaluator Training, Los Angeles, CA, Andrea Foster, M.A., A.B.V.E., C.V.E., P.V.E., I.P.E.C., (December, 2017).

**“Opiates, Opioids and Behavioral Observations”** FACTS Vocational Evaluator Training, Los Angeles, CA, Andrea Foster, M.A., A.B.V.E., C.V.E., P.V.E., I.P.E.C., (September, 2017).

**“Occupational Outlook Handbook and Vocational Interest Resources”** FACTS Vocational Evaluator Training, Reseda, CA, Andrea Foster, M.A., A.B.V.E., C.V.E., P.V.E., I.P.E.C., (May, 2017).

**“Competitive Integrated Employment for People with Intellectual Disabilities,”** FACTS Vocational Evaluator Training, Los Angeles, CA, Craig Houston, MS., IPEC., (March, 2017).

**“Criminal Records and Their Impact on Employment Plans and Expungement Process,”** FACTS Vocational Evaluator Training, Los Angeles, CA, Justin Kaaiakamanu, MSW, PVE., I.P.E.C., (August, 2016).

**“Learning Disability Guidelines, a Comparison of Cognitive Instruments,”** FACTS Vocational Evaluator Training, Reseda, CA, presenter – Andrea Foster, M.A., A.B.V.E., C.V.E., P.V.E., I.P.E.C., (June, 2016).

### **SKILLS AND ABILITIES**

- Supervised six Vocational Counselors and Clerical Staff Members.
- Reviewed and edited monthly status reports of claims for Workers’ Compensation.
- Monthly strategic planning of caseload.
- Managed company’s business operations: computer systems, accounting, and business assessment for perspective and established clients.
- Prepared Employment Plans for GAIN and GROW programs in Los Angeles and Orange Counties.
- Experienced in the administration and scoring of various vocational interest, aptitude; cognitive, academic, and personality tests.
- Conducted Learning Disability Evaluations for CalWORKs participants including identification of learning disability or developmental disabilities, as well as reasonable accommodations for training and employment.

### **PROFESSIONAL MEMBERSHIPS**

American Board of Vocational Experts (ABVE), *2018 – Present*

Vocational Evaluation and Career Assessment Professional (VECAP), *July 2006 – Present*

## Curriculum Vitae

*of*

### **Manuel Zaragoza**

Foster Assessment Center & Testing Service, Inc.  
5121 Stockdale Highway., Suite 250  
Bakersfield, CA 93309  
(661) 396-7863 Fax: (661) 396-7865

#### **EDUCATION**

**Bachelor of Science** Degrees in Psychology and Business Administration from Notre Dame de Namur University, Belmont, California, conferred May, 1998.

#### **EXPERIENCE**

##### **Vocational Assessment and Learning Disability Evaluator / Center Director**

Foster Assessment Center & Testing Service, Inc., 7/2022 – Present

- Provide career guidance to CalWORKs participants, including the development of employment plans;
- Take behavioral observations and recording behavior patterns of client's physical tolerances, stamina, endurance, worker traits, skill levels, aptitudes and interests;
- Administer, score, and interpret all psychometric tests and work sample results;
- Plan and present at exit conferences with participants and counselors;
- Interpret specific vocational data to the client on a regular basis;
- Identify learning disabilities and recommendations of reasonable accommodations;
- Maintain expertise and full knowledge in the areas of norms utilized per individual psychometric, work samples, and index;
- Knowledgeably run all administrative aspects of the center;
- Conduct orientations and individual interviews with clients; and
- Provide all the above services in both English and Spanish.

##### **Social Work Care Manager**

Partners in Care Foundation, 11/2011 – 3/2021

- Establish relationship with client and family to elicit goals and needs for independent living;
- Evaluate potential client, identify socioeconomic and psychological challenges;
- Conduct in-depth assessments to determine level of care required;

- Develop care plan, implement services, and conduct follow up monitoring of the plan;
- Identify and develop support systems for the client;
- Case conferences, case recording and reporting;
- Work as apart of care management team to provide person-centered planning and services;
- Arrange community services and monitor quality of care;
- Work with client, family and caregivers to maximize self-determination and provision of services.

### **SKILLS AND TRAINING**

- Extensive training in assessment (cognitive, educational & behavioral), program development and implementation; including experience in the mental health/family systems;
- Best Practices training in psychological services; including assessment, intervention, consultation, and research;
- Administrative and supervisory role(s) in communicating and collaborating within a multi-disciplinary team of professionals to develop educational goals and support students in the educational process;
- Provision of a vocational assessments and learning disability evaluations in both English and Spanish;
- Trained within the Stockton Unified School District to provide core subjects to Special Education Needs students;
- Maintain collaborative efforts between FACTS and all Kern County liaisons and administrative professionals within the CalWORKs program.

Curriculum Vitae of  
**Craig Houston, M.S.**

Foster Assessment Center & Testing Service, Inc. (FACTS)  
1603 E. Palmdale Blvd., Suite E  
Palmdale, CA 93550  
(661) 272-9397 Fax: (661) 272-0181

**EDUCATION**

California State University Northridge <b>Master of Science in Counseling</b> , Career Counseling	Northridge, CA August 2006
California State University Northridge Single Subject Teaching Credential (English)	Northridge, CA August 2000
Westmont College <b>Bachelor of Arts Degree in English</b>	Santa Barbara, CA May 1994

**CERTIFICATIONS**

**I.P.E.C.**, International Psychometric Evaluation Certification, Santa Cruz, CA, 2018 to present, Certification #20267.

**WORK EXPERIENCE**

**Vocational Evaluator, Center Director** Foster Assessment Center & Testing Service, Inc.  
Palmdale, CA  
July 2008 to present

**Conducted over 3,000 vocational assessments for GAIN/CalWORKs participants in Los Angeles County.**  
**Conducted over 500 Learning Disability Evaluations for GAIN/CalWORKs participants in Los Angeles County.**

Test administration and interpretation, career guidance, behavioral observations, transferable skills identification, identify employment barriers, and develop employment plans for GAIN/CalWORKs participants.

Evaluate participant work history, academic ability, transferable skills, and aptitudes. Conduct testing, interviews, orientations, and Employment Planning Conferences with GAIN/CalWORKs participants.

Identify learning disabilities and reasonable accommodations.

Provide well-documented Employment Readiness (Vocational Assessment) and Learning Disability Evaluation reports.

**College Access and Career Counselor** Fulfillment Fund, Los Angeles, CA  
April 2007 – June 2008

- Provide career and college counseling advisement to educationally disadvantaged students from urban communities: 98 percent minority and first generation students
- Coordinate college intern program for 30-50 students, with personalized case management.
- Interface with major corporations to establish, initiate, and maintain intern relations for intern program
- Teach various college counseling and career counseling curriculum topics, including college admissions, financial aid, and interviewing and resume writing skills lessons
- Plan, organize, and facilitate major events such as Career Conference for 200 students and professional development training seminars for intern students

- Identify resources to assist students with various counseling needs including job search, informational interviews, career exploration, college admissions examinations, college selection, financial aid, and other needs

**Career Counselor Intern**

College of the Canyons Career and Job Placement Center,  
Santa Clarita, CA  
December 2004 - April 2007

**Career Counselor Intern**

L.A. Pierce College GAIN/CalWORKs Office  
Woodland Hills, CA  
October 2004 - June 2005

- Administered and interpreted career assessments such as SII, MBTI, SDS, COPS, CAPS, DISCOVER, and Card Sorts
- Coauthored and developed curriculum for a for-credit independent study counseling class
- Counseled students and members of the community with career development, career exploration, resume writing, interviewing and job search strategies
- Provided service to diverse student and community population with varying age, economic, educational, cultural, and developmental demographics
- Created and facilitated career and personal development classes
- Managed the career resource library, including the budget and resource selection
- Developed and managed marketing for Job Fair for 130 local employers
- Generated Access and Excel Databases to help track student employment information for annual California Community Colleges Chancellor's Office reports
- Assisted clients with job placement resources and referred students to various campus departments such as such as the Intern (CWEE), Counseling, and Transfer Department
- Trained new career advisor interns on counseling techniques and career assessments

**High School English Teacher**

Granada Hills High School, Granada Hills, CA  
Dec. 1999 - June 2004

**Substitute Teacher**

Hart School District, Santa Clarita, CA  
Jan. 1995 - Aug. 1999

- Taught student groups of up to 40 in English and varying subjects
- Responsible for teaching and advising students in an educational setting
- Prepared and planned lessons, utilizing text, tasks, assignments, projects and timelines
- Evaluated and monitored students' progress
- Maintained school and district required legal documentation and files
- Conducted phone and face-to-face conferences with parents regarding student progress
- Motivated and assisted students based on their personal strengths and preferences

***SPECIALIZED VOCATIONAL ASSESSMENT & LEARNING DISABILITY  
EVALUATION TRAINING***

**“Woodcock-Johnson IV Training: Achievement Battery”**, Downey, CA, Los Angeles County GAIN Vocational Assessment Program, presenter – Dr. Michael Hass, Chapman University (March 3, 2019).

**“Attention Deficit Hyperactivity Disorder and the DSM 5,”** – FACTS Vocational Training by Karen Atwater, M.S.W., Los Angeles, California, March 19, 2014.

**“Employment Barriers, Individual Employment Plan (IEP) and Counseling Techniques,”** – FACTS Vocational Training by Justin Kaaiakamanu, M.S.W., P.V.E., Los Angeles, California, June 12, 2013.

**“Barriers Screening Training, Including Domestic Violence, Substance Abuse and Mental Health,”** – FACTS Vocational Training by Elizabeth Hernandez, B.A., C.V.E., P.V.E., and Bethlehem Tamerat, M.A., Los Angeles, California, September 16, 2013.

**“Ethical Standards via Vocational and Career Assessment Professional (VECAP),”** – FACTS Vocational Evaluator Training by Andrea Foster, M.A., A.B.V.E., C.V.E., P.V.E., Long Beach, California, May 16, 2012.

**“Adherence to Ethical and Legal Principles and Practices,”** – Effectively Supervising Clients, Consumers, and Staff – FACTS Vocational Evaluator Training by Bethlehem Tamerat, M.A., Reseda, California, March 23, 2011.

**“Child and Elder Abuse: Legal Parameters and Notification Procedures,”** – FACTS Vocational Evaluator Training, presenter – Andrea Foster, M.A., A.B.V.E., C.V.E., P.V.E., Downey, California, December 1, 2010.

**“Mental Disorders: Signs, Symptoms and Causes,”** - FACTS Vocational Evaluator Training, presenter – Andrea Foster, M.A., A.B.V.E., C.V.E., Reseda, California, June 2, 2010.

**“Woodcock-Johnson III Training: Cognitive Battery”**, Los Angeles County GAIN Vocational Assessment Program, Dr. Michael Hass, Chapman University (May 24, 2010)

**“Woodcock-Johnson III Training: Achievement Battery”**, Los Angeles County GAIN Vocational Assessment Program, Dr. Michael Hass, Chapman University (May 17, 2010)

**“Learning Disability Evaluation Procedures and Effective Use of Woodcock-Johnson III Test Materials”**, FACTS Vocational Evaluator Training by Andrea Foster, M.A., A.B.V.E., C.V.E., Los Angeles, California, October 17, 2008.

**PROFESSIONAL MEMBERSHIPS**

American Board of Vocational Experts (ABVE), 2016 *Present*

Vocational Evaluation and Career Assessment Professional (VECAP), July 2006 – *Present*

Curriculum Vitae of  
**Catherine Ann Stott**

**EDUCATION**

M.S. Vocational Rehabilitation Counseling. University of Wisconsin, Stout: 1991  
B.S. Vocational Rehabilitation, Business Concentration. University of Wisconsin, Stout: 1989

**CERTIFICATIONS**

P.V.E., Professional Vocational Evaluator, Registry of Professional Vocational Evaluators, Menomonie, Wisconsin.

CCWAVES: Certified Vocational Evaluation Specialist, California: 1992. (CVE #02987)  
Wonderlic Ability-To-Benefit Program, Certified Independent Test Administrator: 2000

**SPECIALIZED TRAINING**

*"Hallucinations"*, by Oliver Sacks (March, 2014)

*"Please Understand Me II – Temperament, Character, Intelligence"* (*The Comparison of Personality Temperaments in Intelligence Roles*), by David Keirse (April, 2013)

*"Counseling Adults in Transition"*, by Mary L. Anderson, Jane Goodman, and Nancy K. Schlossberg (March, 2012)

*"Ethics for Therapists: Update"* [*The Portable Ethicist*], by Thomas L. Hartsell Jr., and Barton Bernstein (February, 2010)

*"Understanding Disability"* [*Medical Aspects of Disability: A Handbook for the Rehabilitation Professionals*, 2005 3<sup>rd</sup> Edition], by Herbert H. Zaretsky, Edwin F. Richter III and Myron G. Eisenberg (May, 2009)

*"Mental Health Drugs"* [*PDR Drug Guide for Mental Health Professionals*], by David W. Sifton (March, 2004)

*"Medical Issues"* [*Medical Aspects of Disability*], Eisenberg, Glueckauf and Zaretsky (September, 2003)

*"Disability Issues"* [*Medical, Psychosocial and Vocational Aspects of Disability*, 2002 Second Edition], by Martin G. Brodwin, Fernando A. Tellez and Sandra Brodwin (August, 2002)

*"Learning Disability Accommodations and Modifications"*, (Long Beach, CA: July, 2002).

*"Traumatic Brain Injuries and Functional Limitations"*, (Long Beach, CA, July, 2002).

*"Learning Disabilities and Abilities"*, (Long Beach, CA: July, 2002).

*"Evaluating Consumers who are Deaf"*, Wendy Montagne (Ontario, CA: January 2002).

*"Working with Clients who have Infectious Diseases"*, Sandy Murray (Los Angeles, CA: October 2001).

*"CPR and First Aid"*, Safety Net, Britt Jordan (Los Angeles, October 2001).

*"Evaluating Clients with Learning Disabilities"*, Susan Vaughan (Los Angeles, CA: October 2001).

***“Multiple Personalities”***, Charlotte Anne Smith (Los Angeles, CA: October, 2001).

***“Determining the Level of Significance of Disability for Department of Rehabilitation Consumers”***, Sharon Akin (Long Beach, CA: July 2001).

***“Feasibility Determination”***, California Association of Rehabilitation and Reemployment Professionals, Paul Crews, Otis Byrd, and Sandra Cortez (Long Beach, CA: May 2001).

***“CalWORKs Partnerships Conference”*** Workshops: (San Diego, CA: December 11–13, 2000).

- *No One’s Unemployable* (Charr Lee Metsker, Employment and Eligibility Branch of California Department of Social Services and Debra Angel, WORKNET)
- *LMI for Welfare-to-Work and Workforce Preparation* (Linda Hax, Philip Hardiman, Brandy Daniel, and Jeanette Barham, Employment Development Department)
- *Best Practices for the Hard-to-Serve* (Pat Galloway and Trish Avery, Department of Social Services)
- *California’s Welfare-to-Work Grant Initiative: Update and Best Practices* (Anna Chambers, Lucia Robles, Quentin Turner, Richton Yee, Donicio Abarquez, Lisa Lacy, Gilbert VonStudnitz, Rick Carroll, Bob Thomas, EDD/CDSS Welfare-to-Work Grant Managers/Consultants)
- *CalWORKs Paths to Self-Sufficiency: An Advocate’s Perspective* (Jodie Berger, Employment Law Center and Clare Pastore, Western Center on Law and Poverty)
- *Effective Job Retention Strategies* (Dena Taylor, Kitty O’Doherty, Leticia Gonzalez-Ponce, and Renee DeMar, Cabrillo College)
- *Meeting the Challenge of Serving Individuals who are Limited English Proficient* (Luz Buitrago, Center of Poverty Law & Economic Opportunity, Roger Lum, Alameda County Social Services, Jodie Berger, Employment Law Center, Christina Chung, Asian Pacific Law Center Development Center, and Doris Ng, Equal Rights Advocates)
- *Assessment Language to Help CalWORKs Clients Pursue Excellence* (Jane Equez and Ingrid Greenberg, CASAS)
- *Role of Learning Disabilities in Teaching CalWORKs Recipients* (Eileen Calise, California Department of Education)

***“Overview of the Workforce Investment Act (WIA)”***, the County of Orange JTPA (Santa Ana, CA: February, 2000)

***“Evaluating Clients with Mental Health Conditions”***, Susan Vaughan (Long Beach, CA: July 1999)

***“Evaluating Clients with Learning Disabilities: Utilization of the Prescriptive Reading Performance Test (PRPT): A Scale for the Diagnosis of Dyslexia”***, Susan Vaughan (Thousand Oaks, CA: April 1999)

**Employment Readiness Demonstration Project (ERDP)**: Secondary Screening Training, Martha Wilson and Dan McMillan (Sacramento, CA: February 8-10, 1999)

***“CalWORKs Partnerships Conference”*** Workshops: (San Diego, CA: December 15-17, 1998)

- *Welfare-to-Work & Learning Disabilities: The Connection* (Nancie Payne, Payne & Associates)
- *Employability Skills Assessments: What employers want* (Paul Bott, California State University, Long Beach and Ed King, California Department of Education)
- *Career Development: Who? What? Why? When? How?* (Milton Wilson, California Department of Education)
- *Welfare-to-Work: Screening Assessment & Diagnosis* (Nancie Payne, Payne & Associates), Welfare-to-Work Program Overview (Terri Angelo, Employment Development Department)

***“Role of CalWORKs Behavioral Health Care (Substance Abuse and Mental Illness)”***, Ken White: (Garden Grove, CA: 1998)

***“One-stop: National, Local, and State Perspectives”***, Western Job Training Partnership Association (Coronado, CA: March 1997).

*"Welfare Reform, an Overview"*, Western Job Training Partnership Association (Coronado, CA: March 1997).

*"Using Labor Market Information as a Link to Economic Development"*, Western Job Training Partnership Association (Coronado, CA: March 1997).

*"Current Issues in Assessment"*, Western Job Training Partnership Association (Coronado, CA: March 1997).

Attendance at Statewide GAIN/CalWORKs Conference, 1994, 1995, 1996, 1997, 1998, 2000.

*"Utilization of ERISS Profiler for Computerized Transferable Skills Analysis"*, by K. D. Nyegard (Thousand Oaks, CA: May 12, 1994).

*"Partnership for GAIN: Developing Resources for Change"* Workshops: Counseling, American With Disability Act, Vocational Rehabilitation Framework for Vocational Assessment, Labor Market Information for Today. Presented by California Department of Education and other co-sponsors. (Irvine, CA: 1993).

## PROFESSIONAL EXPERIENCE

### *Research Consultant*

### **Foster Assessment Center & Testing Service, Inc.**

5/03 – Present

- Compile county demand lists for Los Angeles, Fresno, Kern, Orange, San Bernardino, Ventura, and Riverside Counties.
- Research and compilation of case manager annual feedback results.
- Compilation and research of participant feedback results annually for specific programs.
- Monitoring and research new FACTS Assessors' educational qualifications and follow-up on their completion of required career counseling coursework, and as completion of Certified Vocational Evaluator status through the Commission on Certification of Work Adjustment and Vocational Evaluation Specialists (CCWAVES)

### *Education and Training Manager*

### **Foster Assessment Center & Testing Service**

#### *Vocational Assessor*

8/93 – 12/02

#### *Director of the County of Orange Operations*

- Assess WIA, Independent Living Program, and Welfare-to-Work participants' academic grade levels, cognitive abilities, skills, aptitudes, worker traits, and transferable skills.
- Conduct 12 FACTS staff in-house training sessions annually
- Present case manager and counselor training sessions in assessment services
- Identify and determine employment goals to assist in the formation of Individual Employment Plans
- Document employment barriers and accommodations to overcome employment barriers
- Supervise/train staff
- Perform computerized transferable skills analysis
- Conduct work evaluations for injured workers and California Department of Rehabilitation consumers
- Oversee daily operation of the County of Orange assessment centers
- Coordinate and present training seminars for WIA and Social Service Agency Case Managers, Social Workers, Program Managers, and partner agencies
- Analyze participant and case manager feedback for services completed
- Research new psychometric tests and updated norms for existing tests
- Perform quality assurance monitoring on FACTS evaluators
- Prepare staff and assessment centers for accreditation by the Commission on Accreditation for Rehabilitation

### *Certified Vocational Evaluator:*

### **Foster Assessment Center & Testing Service**

11/91 – 12/02

- Assess client's physical tolerances, stamina/endurance, cognitive processing levels, aptitudes and skills
- Identify vocational directions or alternatives conducive to skill and aptitude testing results within demonstrated physical tolerance levels

- Provide rehabilitation services to a variety of populations: Including clients with lower back, thoracic outlet, carpal tunnel, suicidal, stress, blind, and traumatic head injury cases
- Conduct initial interviews, orientations, and exit conferences with injured workers and their rehabilitation counselors, attorneys, and insurance representatives
- Implement test modifications and assistive devices to broaden employability opportunities
- Perform report writing

***Consumer Education Instructor:***

**Work Training Program**  
2/90 - 11/91

- Prepared and implemented classroom instruction curriculum for 40 mild to moderately developmentally disabled adults
- Utilized methods and applications of applied behavioral treatment plans, with instructional procedures, lesson plans and data collection techniques
- Provided in-service training to staff

***Employment Readiness Training Assistant:***

**Projects with Industry (University of Wisconsin)**  
8/86 - 1/87

- Provided one-on-one employment readiness training
- Taught job seeking skills and assisted individuals with developing resumes
- Identified intellectual and academic skills appropriate to career change
- Counseled clients on economic forces and jobs relevant to the labor market

**PRESENTATIONS**

- *“Vocational Evaluation Training Session for Department of Rehabilitation Counselors: Planning for Vocational Rehabilitation Services, Occupation and Labor Market Information, Interpretation of Assessment Report, and Theories of Career Development”*, Catherine Stott (Ontario, CA; Riverside, CA; and Garden Grove, CA: April, May, and June 2001)
- *“Vocational Assessment Services for Independent Living Program Youth: Information and Orientation to the Assessment Process, Assessment Referral, Employment Goal Development, and Assessment Report Interpretation”*, Catherine Stott (Garden Grove, CA: May 2001)
- *“Assessment Services for Workforce Investment Act and Welfare-to-Work Programs: Benefits of Assessment Under WIA, Tour of Assessment Facility, Referral Procedure, Interpretation of Assessment Report, Occupation and Labor Market Information, and Employment Goal Development”*, Catherine Stott and Jenny Bates (Garden Grove, CA: March 2001)
- *“Procedures to Follow for Clients Who Have Psychiatric Disabilities”*, Catherine Stott (Los Angeles, CA: January 2000)
- *“Case Manager & Initial Services Worker Orientation to the Vocational Assessment Process”*, Rebecca Ta, Nerina Garcia, and Catherine Stott (Anaheim, CA; Santa Ana, CA; and Garden Grove, CA: 1998)
- *“Review of the Vocational Assessment Process: Understanding the Vocational Assessment Report, Flowchart of the CalWORKs Participant in the Assessment, Referrals to Work Experience Versus Vocational Classroom Training, Employment Barriers/Employment Recommendations”*, Nerina Garcia, Francisco Morales, and Catherine Stott (Anaheim, CA; Santa Ana, CA; and Garden Grove, CA: 1998)
- *“Department of Rehabilitation Training and Orientation”* (Garden Grove, CA: April 1997)
- *“Orientation to the Vocational Assessment Process to Partner Agencies of the West Orange County Regional One-Stop Center”* (Garden Grove: CA: February 1997)

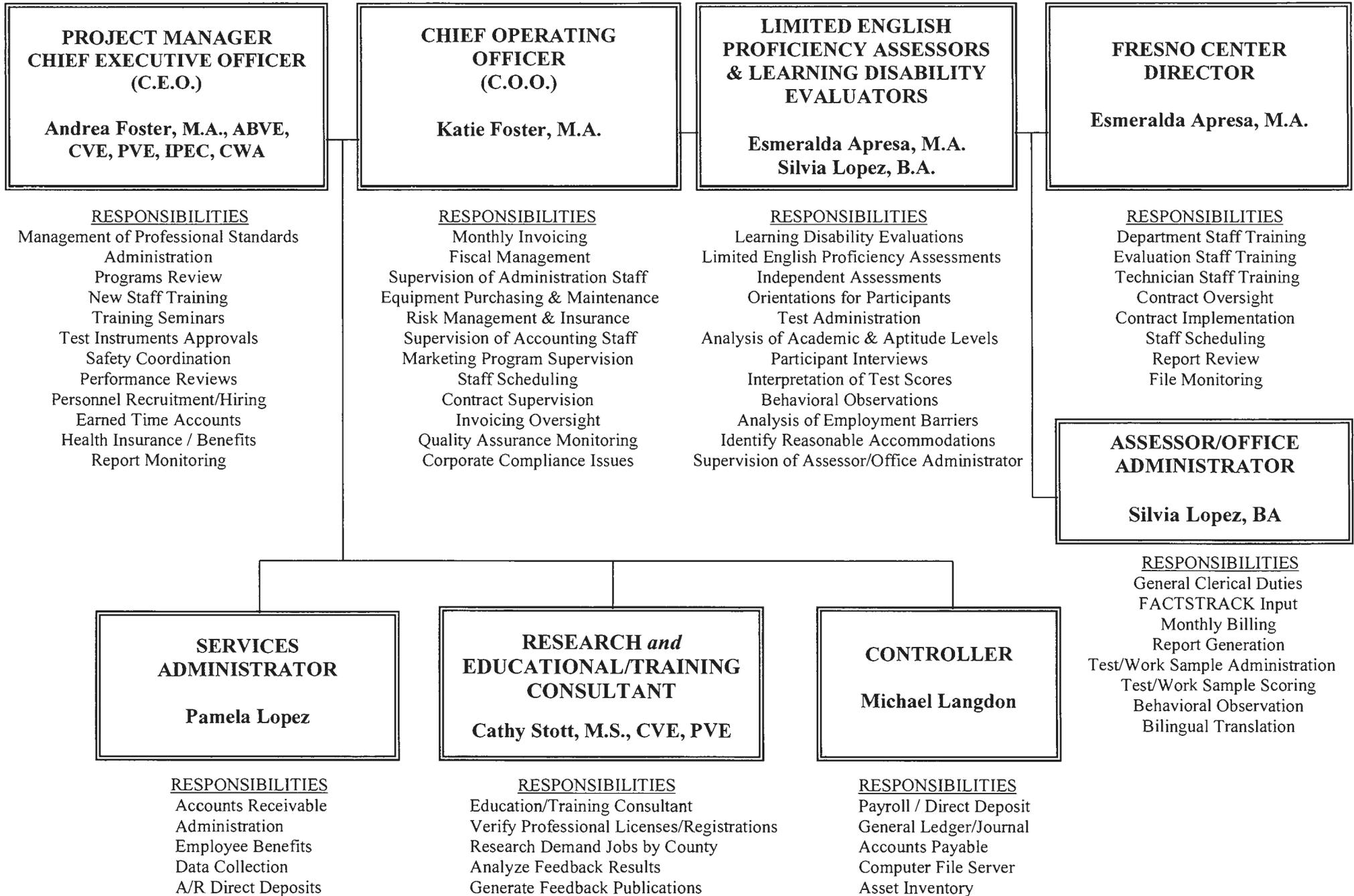
- *"GAIN Orientation to New Case Managers"* (Garden Grove, CA: May 1997, April 1997, and July 21, 1995)
- *"Devising and Utilizing a Labor Market Assessment Survey"* Partnership for GAIN Conference (San Francisco, CA: July 3, 1994)
- *"Integration of Graphic Depictions for Report Writing"* Training seminars sponsored by Foster Assessment Center & Testing Service, in conjunction with ERISS, Inc. (Garden Grove, CA: October 1993)
- *"Use of Vocational Tests to Formulate Employment Strategies"* Training seminar series sponsored by Foster Assessment Center & Testing Service, in conjunction with the Department of Social Services, Garden Grove. (Garden Grove, CA: September and October 1993)

## PUBLICATIONS

- *"Customized Labor Market Surveys Make Job Developers' Task Easier"* (November, 1994) Welfare-to-Work Publication.
- *"A Compilation of Survey Results on the Job Placement of Vietnamese and Southeast Asian Minorities via the GAIN Program and Community Based Organizations"* (August, 1994) CARRP (California Association of Rehabilitation & Reemployment Professionals) Newsletter.
- *"Job Placements of Vietnamese and Southeast Asian Minorities in California"* (July-September, 1994) Asian Migrant Newsletter.
- *"A Compilation of Survey Results on the Job Placement of Vietnamese and Southeast Asian Minorities via the GAIN Program and Community Based Organizations"* (July, 1994) SCRE (Southern California Rehabilitation Exchange) Newsletter.

**ORGANIZATIONAL CHART – Fresno County**

**DELINEATES LINES OF AUTHORITY AND RESPONSIBILITY for FOSTER ASSESSMENT CENTER & TESTING SERVICE, INC.**



## *Assessment Instruments*

*The following is a description of the most commonly utilized standardized testing instruments available to CalWORKs WTW participants when assessed by Foster Assessment Center & Testing Service, Inc. (FACTS). However, FACTS staff also has access to over 100 psychometric (paper/pencil) instruments and hands-on work samples, which are all validated and normed by the test publisher. FACTS utilizes a highly standardized test selection process ensuring norms of appropriate population parameter, gender, race/ethnicity, education and/or geographic region (when applicable) for every test listed in this RFP. Internal coefficient consistency, test-retest reliability and inter-scorer agreement, inter-correlation, equivalencies, convergent validity and predictive validity are all reviewed prior to test selection and administration.*

*We have listed the test manufacturer (when applicable) for each test with specific indicators measured (aptitude, ability, etc). Most publishers have generally been in business for decades, and are regularly utilized for testimony in court, passing stringent standards for court accepted reliability and validity challenges. Tests, Assessments and Aptitude Measurements used by FACTS have been selected, in part, based on their nationally accepted norms, standardized test formats, ease of administration, and their documented validity and reliability by peer reviewed studies. FACTS currently utilize over 150 tests and assessments. In depth validity and reliability statistics provided by the publisher are on file and can be made available upon request.*

*When used independently, assessments can predict an individual's performance in a specific activity (criterion-prediction). However, when selecting assessments for use, FACTS reviews the construct validity and test correlations values with several other psychometric tests to create a battery of tests specifically applicable to the participant. Utilizing assessments with high coefficient correlations to one another allows the evaluator to reliably compare a participant's achievement directly with intelligence. Understanding this relationship is critical when identifying appropriate work related activities and job goals.*

## Aptitude Inventories

Name & Brief Description of Instruments	Type (e.g., paper & pencil, audio, online, computer assisted)	Characteristics (what it measures, purpose or function)	Language Availability of Assessment Instruments	Minimum Reading Proficiency Level Required for Each Language	Estimated time required per referred participant to complete each instrument
Gates-MacGinitie Reading Tests (Levels 2,4,6,7/9,10/12)	Paper/Pencil	Reading Comprehension 0-12 grade levels	English	1 <sup>st</sup> Grade	65 min
Narrative Description:	<p>- <b>Reliability:</b> Published by Riverside Publishing, one of the most reliable test manufacturers throughout the United States. These tests are normed against national standards, so assessors can determine where individual participants, or a group of participants, stand in relation to others at the same grade level across the country. Derived scores are based on standardized, nationwide representative sampling.</p> <p>-<b>Sensitive to learning, literacy language and socio-cultural issues:</b> Answers question such as demonstrated reading scores, reading rates, if special attention is needed in comprehension improvement, and specific grade level of comprehension and vocabulary.</p> <p>-<b>Fair/Accurate Results:</b> According to the Collaborative Center for Literacy, these tests are aligned with state and national reading standards, specifically the Common Core standards being adopted by states and school districts across the country. The tests assess the major areas of reading, including phonemic awareness, phonics, vocabulary and comprehension. They include both fiction and nonfiction test items and assess responses to texts based on the complexity at different grade levels. Validated norm groups are accurately portrayed for content, and are updated regularly by national test</p>				

	<p>manufacturer. Provides a series of five levels of standardized achievement tests of vocabulary and reading comprehension, from the 2nd to the 12th grade level. Percentile scores are also provided.</p> <p><b>-Ensure Program Objectives:</b></p> <ul style="list-style-type: none"> <li>• Provides required reading comprehension and vocabulary levels needed during the assessment process</li> <li>• Powerful diagnostic tools used nationally to help identify an individual’s level of reading achievement</li> <li>• Developmentally appropriate for all learners – from beginning readers to adults</li> <li>• Identifies participant’s that need additional individual diagnosis and special instruction</li> <li>• Measures each important stage along the comprehension continuum—from listening skills to mature reading comprehension</li> </ul>				
<p>Nelson Denny Reading Test</p>	<p>Paper/Pencil</p>	<p>Reading Vocabulary &amp; Comprehension Grade Level College</p>	<p>English</p>	<p>9<sup>th</sup> Grade</p>	<p>35 min</p>
<p>Narrative Description:</p>	<p><b>-Reliability:</b> Published by Riverside Publishing, one of the most reliable test manufacturers throughout the United States. The Nelson-Denny Reading Test, Forms G and H, is a reading survey test for high school and college students and adults. A two-part test, the Nelson-Denny measures vocabulary development, comprehension, and reading rate. Part I (Vocabulary) is a fifteen-minute timed test; Part II (Comprehension and Rate) is a twenty-minute test. The first minute of the Comprehension test is used to determine reading rate.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Standardization is based on geographic region, district enrollment, socioeconomic status and various other variables to ensure sensitivity. This test measures achievement to the 18.9 grade level and provides not only grade levels but percentile scores.</p> <p><b>-Fair/Accurate Results:</b> Validated norm groups that are accurately portrayed for content, and updated regularly by national test manufacturer. A unique feature of the 1993 edition is the extended-time administration of the test to meet the needs of special populations, such as students with English as a second language or as a foreign language, or returning adults.</p>				

	<p><b>-Ensure Program Objectives:</b></p> <ul style="list-style-type: none"> <li>• Provides required reading comprehension levels needed during the assessment process</li> <li>•Aids in accurate placement of participants into appropriate work related activities</li> <li>•Provides comprehension passages drawn from widely used high school and college texts</li> <li>•Includes a vocabulary section that focuses on words participants need for success in today's work environments</li> <li>•Offers optional extended-time administration to meet the needs of special populations</li> <li>•Eliminates racial and gender bias</li> <li>•Includes national norms for high schools and two- and four-year colleges</li> </ul>				
Wide Range Achievement Test 5 (WRAT)	Paper/Pencil	Spelling & Math	English	1 <sup>st</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by Riverside Publishing. The WRAT 5 is a norm-referenced test that measures the basic academic skills of word reading, sentence comprehension, spelling, and math computation. It was standardized on a representative national sample of over 3,000 individuals ranging in age from 5 to 94 years. The normative sample was selected according to a stratified national sampling procedure with proportionate allocation controlled for age, gender, ethnicity, geographic region, and parental/obtained education as an index of socioeconomic status. Alternate forms, designated the Blue Form and the Green Form, were developed and equated during standardization by use of a common-person research design. Derived scores were developed for both age- and grade-referenced groups. Standard scores, percentile ranks, stanines, normal curve equivalents, grade equivalents, and Rasch ability scaled scores are provided.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Standardization is based on geographic region, district enrollment, socioeconomic status and various other variables to ensure sensitivity. This test measures achievement from Kindergarten to the 12.9 grade level and provides not only grade levels but percentile scores. If the participant is unable to read, this test provides a pictorial measure in order to determine letter recognition (spelling) and counting ability (math).</p>				

	<p><b>-Fair/Accurate Results:</b> Validated norm groups that are accurately portrayed for content, and updated regularly by national test manufacturer. The WRAT has progressively modified over the years from the WRAT 2, WRAT 3, WRAT 4 and currently, the WRAT 5. Percentile ranks, stanines and normal curve equivalents conform to the statistical properties of the normal curve, resulting in a fixed relationship between the standard scores and percentile ranks.</p> <p><b>-Ensure Program Objectives:</b> Provides required spelling and math levels needed during the assessment process.</p>				
<p>Test of Adult Basic Skills (TABE)</p>	<p>Paper/Pencil</p>	<p>Vocabulary, Reading Comp &amp; Math grade levels</p>	<p>English, Spanish</p>	<p>4<sup>th</sup> Grade</p>	<p>2 – 3 hours</p>
<p>Narrative Description:</p>	<p><b>-Reliability:</b> Published by McGraw Hill, one of the most reliable test manufacturers throughout the United States. TABE remains the most comprehensive and reliable academic assessment product in adult basic education. Educators use TABE testing to provide a solid foundation for effectively assessing the skills and knowledge of adult learners. Derived scores are based on a standardized representative sampling, with regularly updated norms.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> The TABE is unique in that it provides a “Locator” test in order to obtain the most appropriate level of reading comprehension and math, resulting in a more accurate identification of an individual’s grade level equivalency and any potential sensitivity to language or socio-cultural issues that may need to be addressed. Provided in both English and Spanish.</p> <p><b>-Fair/Accurate Results:</b> Validated norm groups that are accurately portrayed for content, and updated regularly by national test manufacturer. By utilizing the “Locator” test, provides a fair and accurate depiction of actual grade levels.</p> <p><b>-Ensure Program Objectives:</b> Provides required reading comprehension and math levels needed during the assessment process.</p>				

RAI Arithmetic Index (SRA Arithmetic)	Paper/Pencil	Arithmetic Computation Proficiency	Nonverbal Any Language	1 <sup>st</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by General Dynamics Information Technology (formerly known as Vangent), one of the most reliable test manufacturers throughout the United States. The RAI Arithmetic Index is a paper-and-pencil inventory that measures the participant's level of development in math computation.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test can be given in either English or Spanish, and breaks down components of arithmetic computation, from simple to easy mathematical understanding. The Arithmetic Index, contains 54 items that test ability to add, subtract, multiply, divide and use fractions, decimals and percentages to grade eight.</p> <p><b>-Fair/Accurate Results:</b> The RAI Arithmetic Index has a wide range of utility in assessing a participant's strengths and weaknesses in regards to their mathematic computation skills. It has been specifically validated for accuracy against the following occupations: Claims auditor, Electrician, Key punch operator, Maintenance mechanic, Telephone service representative, Warehouse/materials handler, plumber, Telegrapher, Yard clerk. Validated norm groups that are accurately portrayed for content, and updated regularly by national test manufacturer. Has recently expanded to include grade equivalents in addition to percentile rankings.</p> <p><b>-Ensure Program Objectives:</b> Provides required math proficiency needed during the assessment process. The RAI Arithmetic Index is designed to identify specific areas of arithmetic computation that may be problematic for a participant (addition and subtraction of whole numbers; multiplication and division of whole numbers; basic operations involving fractions; basic operations involving decimals and percentages), which assists in making more accurate and appropriate recommendations when considering work related activities or academic remediation.</p>				
RAI Reading Index (SRA Reading)	Paper/Pencil	Reading Comp Proficiency levels	English	1 <sup>st</sup> Grade	30 min

Narrative Description:	<p><b>-Reliability:</b> Published by General Dynamics Information Technology (formerly known as Vangent), one of the most reliable test manufacturers throughout the United States. The RAI Reading Index is a paper-and-pencil inventory that measures the participant’s level of development in reading.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test breaks down components of reading comprehension from simple word identification to advanced paragraph comprehension. The RAI Reading Index contains 60 items that test a participant’s ability to read and understand basic materials through to grade nine.</p> <p><b>-Fair/Accurate Results:</b> The RAI Arithmetic Index has a wide range of utility in assessing a participant’s strengths and weaknesses in regards to their mathematic computation skills. It has been specifically validated for accuracy against the following occupations: Assembler, Carpenter, Electrician, Freight car repairer, Heavy equipment, operator, Machinist, Salesperson-driver/route person, Telegrapher, Warehouse/materials, Yard clerk. Validated norm groups that are accurately portrayed for content, and updated regularly by national test manufacturer. Has recently expanded to include grade equivalents in addition to percentile rankings.</p> <p><b>-Ensure Program Objectives:</b> Provides required reading comprehension proficiency needed during the assessment process. The RAI Reading Index is designed to identify specific areas of reading/English language skills that may be problematic for a participant (picture-work association, word decoding, comprehension of phrases, comprehension of sentences, comprehension of paragraphs), which assists in making more accurate and appropriate recommendations when considering work related activities or academic remediation.</p>				
Minnesota Paper Form Board (MPFB)	Paper/Pencil	Spatial Perception	Nonverbal Any Language	None	20 min
Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, one of the most reliable test manufacturers throughout the United States. Derived scores are based on a standardized representative sampling, with regularly updated norms. Although Pearson publishes this test, it has been independently evaluated by and number of test manufacturing authors across countries outside of the United States.</p>				

	<p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test is not culturally bound and is sensitive to socio-cultural issues via specific norm grouping. It is pictorial in nature and therefore can be given to many individuals that do not specifically speak English.</p> <p><b>-Fair/Accurate Results:</b> Accurately predicts performance in a variety of technical training settings, including various selections of tools for mechanical, technical, engineering and similar occupations requiring mechanical ability and the capacity to visualize and manipulate objects in space.</p> <p><b>-Ensure Program Objectives:</b> Provides capacity to predict performance within formal training settings requiring mechanical and spatial abilities.</p>				
General Clerical Test (GCT)	Paper/Pencil	Clerical	English Spanish	6 <sup>th</sup> Grade	45 min
Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, one of the most reliable test manufacturers throughout the United States. The standard error of measurement is based on both the standardized deviation of the test scores of a group and on a reliability coefficient. The GCT provides reliability coefficients and standard errors of measurements which are remarkably similar, providing considerable consistency of measurement.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test measures speed and accuracy in performing tasks related to clerical work. It is divided in two clerical and numerical sections, thus differentiating sensitivity to these skills.</p> <p><b>-Fair/Accurate Results:</b> Accurately predicts performance in a variety of clerical settings, including numerically based clerical settings results, and clerical settings involving attention to detail.</p> <p><b>-Ensure Program Objectives:</b> Provides capacity to predict performance within formal training settings requiring clerical, attention to detail and numerical accuracy.</p>				
Valpar 5, Clerical	Hands-on Work Sample	Bookkeeping, Mail Sorting, Filing Phone Answering	English Spanish	6 <sup>th</sup> Grade	3 hours

Narrative Description:	<p><b>-Reliability:</b> Published by Valpar International, this series of work samples has been one of the most often purchased instruments both nationally and internationally. Norms have been updated regularly.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This index combines hands-on and written tasks in addition to both verbal and written instructional formats. It is meant to be progressive in nature in order to reflect various levels and means of learning.</p> <p><b>-Fair/Accurate Results:</b> Provides norming that indicates how the participant would compare to an actual clerical worker within the job setting including measuring a participant's ability to perform a variety of basic clerical tasks including telephone answering, filing, mail sorting, and basic bookkeeping.</p> <p><b>-Ensure Program Objectives:</b> Provides an accurate measure of an individual's ability to perform not only in a work setting, but a measure of their ability to absorb clerical information within a formal training situation.</p>				
Sales Attitude	Paper/Pencil	Sales/Customer Service	English	6 <sup>th</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by General Dynamics Information Technology (formerly known as Vangent). Criterion related validity is reflective of desirable and undesirable attitudes/behaviors of sales personnel within sales situations.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This psychometric was developed to assess behavioral and personality characteristics which have been shown to be important to success and sales occupations.</p> <p><b>-Fair/Accurate Results:</b> This psychometric evaluates an individual's knowledge of general business attitudes to implement the most effective sales decision when presented various sales situations.</p> <p><b>-Ensure Program Objectives:</b> Performance is compared to experienced salespersons and applicants for sales positions in large corporations.</p>				
Sales Aptitude	Paper/Pencil	Sales Aptitude	English	6 <sup>th</sup> Grade	30 min

Narrative Description:	<p><b>-Reliability:</b> Published by General Dynamics Information Technology (formerly known as Vangent). Criterion related validity is reflective of job performance within sales situations.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This psychometric was developed to assess behavioral and personality characteristics which have been shown to be important to success and sales occupations.</p> <p><b>-Fair/Accurate Results:</b> This psychometric evaluates an individual's knowledge of general business concepts and capability to select the most effective sales decision when presented various situations.</p> <p><b>-Ensure Program Objectives:</b> Performance is compared to experienced salespersons and applicants for sales positions in large corporations.</p>				
Computer Operator Aptitude Battery	Paper/Pencil	Computer	English	6 <sup>th</sup> Grade	45 min
Narrative Description:	<p><b>-Reliability:</b> Published by General Dynamics Information Technology (formerly known as Vangent), and has been consistently published and utilized for decades as a predictive measure of success with formal training/employer training settings for computer operators.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test commences with easier issues, commencing to more difficult measures. Much of the test is pictorial, allowing literacy flexibility.</p> <p><b>-Fair/Accurate Results:</b> Accurately predicts performance in a variety of training settings, including computer operators, and normed on experienced operators and trainees for operator jobs.</p> <p><b>-Ensure Program Objectives:</b> Provides capacity to predict ability to perform computer operator job and potential for learning computer programming within formal training settings</p>				
Tower 3 Typing	Computer	Typing-Correct Words Per Minute	English	1 <sup>st</sup> Grade	20 min
Narrative Description:	<p><b>-Reliability:</b> Published by Testing Orientation and Work Evaluation in Rehabilitation via the International Center for the Disabled (ICD) a noted test manufacturer, in publication for decades.</p>				

	<p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This index is a typing speed and accuracy test, sensitive to all learning styles, socio-economic issues, and languages utilizing English lettering.</p> <p><b>-Fair/Accurate Results:</b> Provides a normed, validated data entry score that is based on correct words per minute.</p> <p><b>-Ensure Program Objectives:</b> Assists with the determination of entry standards for any type of program requiring use of a computer or clerical data entry.</p>				
Tower 6, Bookkeeping	Paper/Calculator	Bookkeeping/ Accounting	English	6 <sup>th</sup> Grade	4 – 5 hours
Narrative Description:	<p><b>-Reliability:</b> Published by Testing Orientation and Work Evaluation in Rehabilitation via the International Center for the Disabled (ICD) a noted test manufacturer, in publication for decades.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Instructions are provided in a written format to provide the participant time to progress at their own speed, and read instructions as needed.</p> <p><b>-Fair/Accurate Results:</b> Provides a normed, validated score that is based on a comparison of employed workers within accounting and bookkeeping fields in addition to demonstrating test scores reflecting attention to detail, numerical skills and utilization of office equipment such as an adding machine.</p> <p><b>-Ensure Program Objectives:</b> This index is a bookkeeping task with written instructions outlining essential functions utilized within an accounting work environment.</p>				
Bennett Mechanical Comprehension Test	Paper/Pencil	Mechanical Theory	English Spanish	6 <sup>th</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, and has been consistently published and utilized for decades as a predictive measure of success with formal training/employer training settings for mechanical occupations.</p>				

	<p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test commences with easier issues, commencing to more difficult measures. Much of the test is pictorial, allowing literacy flexibility.</p> <p><b>-Fair/Accurate Results:</b> Accurately predicts performance in a variety of mechanical training settings. Evidence of reliability is presented in two terms: as a reliability coefficient, or as a standard error of measurement.</p> <p><b>-Ensure Program Objectives:</b> Provides a measure of the ability to perceive and understand the relationship of physical forces and mechanical elements in practical situations.</p>				
How Supervise?	Paper/Pencil	Supervisory	English Spanish	6 <sup>th</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, one of the foremost test publishers in the United States, and has been consistently published and utilized as a predictive measure of knowledge of supervisory practices and business concepts.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test accurately commences the supervisor role from the lowest to the highest levels, which reflects our attitudes and initiates practices which greatly influence worker efficiency.</p> <p><b>-Fair/Accurate Results:</b> This test was obtained thorough conferences with industrial supervisors and industrial relations personnel, and in careful examination of the literature dealing with industrial supervision.</p> <p><b>-Ensure Program Objectives:</b> This test was designed to assess the knowledge of practices affecting worker efficiency and provides capacity to predict performance within formal training settings requiring supervisory skills.</p>				
Tower Machine Shop I and Tower Machine Shop II	Paper/Pencil	Form Perception/ Blueprint Reading	English Spanish	6 <sup>th</sup> Grade	30 min

Narrative Description:	<p><b>-Reliability:</b> Published by Testing Orientation and Work Evaluation in Rehabilitation via the International Center for the Disabled (ICD) a noted test manufacturer, in publication for decades.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Is a pictorial measure and is therefore sensitive to various types of leaning. Norms are socio-culturally based and can be given in both English and Spanish.</p> <p><b>-Fair/Accurate Results:</b> This psychometric involves reading of simple to complex three dimensional diagrams, requesting measurements utilizing special and form perception.</p> <p><b>-Ensure Program Objectives:</b> Provides a clear, normed score for tasks involving blueprint reading, cognitive processing, and occupations involving use of diagrammatic instructions.</p>				
Valpar 6, Independent Problem Solving	Hands-on Work Sample	Independent Problem Solving	Nonverbal Any Language	None	20 min
Narrative Description:	<p><b>-Reliability:</b> Published by Valpar International, this series of work samples has been one of the most often purchased instruments both nationally and internationally. Norms have been updated regularly.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This index combines hands-on tasks in addition to a verbal instructional format. It is meant to be demonstrative of learning via not only verbal instructions, but with cues involving color, shape, and size.</p> <p><b>-Fair/Accurate Results:</b> Provides norming that indicates how the participant would compare to an actual worker within a quality control job setting.</p> <p><b>-Ensure Program Objectives:</b> Provides an accurate measure of an individual's color discrimination, ability to follow verbal instructions, ability to follow diagrammatic instructions and sensitivity to quality control issues involving color, shape, and size.</p>				
Valpar 10, Tri-level	Hands-on Work Sample	Inspection (NC)	Nonverbal Any Language	1 <sup>st</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by Valpar International, this series of work samples has been one of the most often purchased instruments both nationally and internationally. Norms have been updated regularly.</p>				

	<p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This index combines hands-on tasks in addition to a verbal instructional format. It is meant to be demonstrative of learning via not only verbal instructions, but with cues involving utilizing of instruments such as a caliper, and micrometer.</p> <p><b>-Fair/Accurate Results:</b> Provides norming that indicates how the participant would compare to an actual worker within an advanced quality control job setting.</p> <p><b>-Ensure Program Objectives:</b> Provides an accurate measure of an individual's inspection skills, utilizing measurement techniques with gauges and other tools.</p>				
Valpar 15, Electrical	Hands-on Work Sample	Electronics	Nonverbal Any Language	None	60 min
Narrative Description:	<p><b>- Reliability:</b> Published by Valpar International, this series of work samples has been one of the most often purchased instruments both nationally and internationally. Norms have been updated regularly.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This index combines hands-on tasks in addition to a verbal instructional format. It is meant to be demonstrative of learning via not only verbal instructions, but with cues involving utilizing of power cords, audible sound verification and use of small electrical tools. It can be given in any language.</p> <p><b>-Fair/Accurate Results:</b> Provides norming that indicates how the participant would compare to an actual worker within an advanced electrical technician job setting.</p> <p><b>-Ensure Program Objectives:</b> Provides an accurate measure of an individual's ability to use fine electrical tools skills, utilize measurement techniques, and determination continuity in both an employment and formal training situation.</p>				
Valpar 16, Drafting	Hands-on Work Sample	Drafting	English Spanish	7 <sup>th</sup> Grade	60 min
Narrative Description:	<p><b>Reliability:</b> Published by Valpar International, this series of work samples has been one of the most often purchased instruments both nationally and internationally. Norms have been updated regularly.</p>				

	<p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This index combines hands-on tasks in addition to a verbal instructional format. It can be given in both English and Spanish, and is progressive in nature in order to allow the participant to stop at various levels if the task becomes too difficult.</p> <p><b>-Fair/Accurate Results:</b> Provides norming that indicates how the participant would compare to an actual worker within a drafting formal training and/or job setting.</p> <p><b>-Ensure Program Objectives:</b> Provides an accurate measure of an individual’s drafting skills.</p>				
Minnesota Clerical Test	Paper/Pencil	Clerical/ Proofreading	English	1 <sup>st</sup> Grade	15 min
Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, one of the foremost test publishers in the United States.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This psychometric attempts to measure the ability to see differences or errors and pairs of numbers in pairs of names, a predictor of successful performance in a variety of routine clerical jobs.</p> <p><b>-Fair/Accurate Results:</b> This psychometric is designed to measure elements of perceptual speed and accuracy of the type required to perform various clerical activities.</p> <p><b>-Ensure Program Objectives:</b> Assists in predicting successful performance for a wide variety of clerical jobs, including the clerks, typists, cash years, and bank tellers.</p>				
Narrative description <i>for all below listed JEVS work samples from #2 above. Note the differences in type, characteristics, language, reading level and time are listed for each task.</i>	<p><b>-Reliability:</b> Published by Vocational Research Institute, prepared under contract with the United States Department of Labor. This series of hands-on work samples is specifically designed to measure skills outlined in both the Dictionary of Occupational Titles and O*NET essential job functions.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> These work samples are sensitive, as they can be given verbally, with sign language, and most via numerous languages. One of the most valuable tools within this work sample system is the very specific behavioral observations that can be generated by watching the participant complete each hands on task. This is especially useful for individuals having physical, mental, or various disability issues.</p>				

	<p><b>-Fair/Accurate Results:</b> These work samples are normed for both time and quality of task, and provide standardized and normed values for both the efficiency and accuracy results.</p> <p><b>-Ensure Program Objectives:</b> These work samples provide crucial data regarding skills such as general intelligence, verbal comprehension, numerical comprehension, spatial perception, form perception, clerical perception, motor coordination, finger dexterity, manual dexterity, eye-hand-foot coordination, and color discrimination, all essential functions as listed by the Department of Labor for each individual job category.</p>				
JEVS 12, Leather	Hands-on Work Sample	Inspection	Nonverbal Any Language	None	5 min
JEVS 36, Lock	Hands-on Work Sample	Mechanical	Nonverbal Any Language	None	40 min
JEVS 40, Filing by Number	Hands-on Work Sample	Clerical	English Spanish	1 <sup>st</sup> Grade	70 min
JEVS 50, Filing by Letters	Hands-on Work Sample	Clerical	English Spanish	2 <sup>nd</sup> Grade	90 min
JEVS 51, Nail and Screw	Hands-on Work Sample	Inspection	Nonverbal Any Language	None	15 min
JEVS 52, Adding Machine	Hands-on Work Sample	Calculation	Nonverbal Any Language	1 <sup>st</sup> Grade	60 min
Leadership Opinion Questionnaire	Paper/Pencil	Leadership Skills	English	6 <sup>th</sup> Grade	20 min
Narrative Description:	<p><b>-Reliability:</b> Published by General Dynamics Information Technology (formerly known as Vangent), one of the most reliable test manufacturers throughout the United States. Percentile norms were based on more than three thousand supervisory and managerial personnel in diverse organizations and organizational levels.</p>				

	<p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This index provides a self-assessed determination, with sensitivity to an individual's opinions, planned actions within a work setting, and gives credence to which settings work best for that participant.</p> <p><b>-Fair/Accurate Results:</b> This test has been used for counseling and for providing managers with insights into their own leadership attitudes relative to those of other groups of supervisors in their organization in comparable jobs, or in terms of the general supervisory population.</p> <p><b>-Ensure Program Objectives:</b> This test provides measures of two important dimensions of supervisory leadership; consideration and structure. These two broad patterns have been shown to be meaningful in a wide variety of supervisory-subordinate situations.</p>				
Crawford Small Parts Dexterity	Hands-on Work Sample	Dexterity	Nonverbal Any Language	None	15 min
Narrative Description:	<p><b>-Reliability:</b> Published by the Pearson, one of the foremost test publishers in the United States. Norms have been updated regularly.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This task can be given in any language, and involves simple verbal directions. No formal education is necessary, as it involves basic use of small tools.</p> <p><b>-Fair/Accurate Results:</b> Validated and normed on employees within work settings involving fine hands on tasks and small tool utilization.</p> <p><b>-Ensure Program Objectives:</b> This work sample provides a measure of fine eye-hand coordination and use of fine hand tools, helpful when entering formal training and/or occupations involving these skills.</p>				
Purdue Pegboard	Hands-on Work Sample	Fine Finger Dexterity	Nonverbal Any Language	None	15 min
Narrative Description:	<p><b>-Reliability:</b> Published by General Dynamics Information Technology (formerly known as Vangent), one of the few standardized nation-wide measurements of fine finger dexterity available and utilized for</p>				

	<p>decades. Derived scores are based on a standardized representative sampling, with regularly updated norms. It is one of the most recognized dexterity measurements in the world.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test is not culturally bound by language, as it can be given in numerous languages. The tests can be repeated up to three times with validated norms, thus ensuring sensitivity to learning. Norming is also sensitive to hand dominance, as the actual setup of the test differs for right handed or left handed individuals.</p> <p><b>-Fair/Accurate Results:</b> Validated norm groups that are accurately portrayed for content, and can be generated for a single administration, or up to three trials.</p> <p><b>-Ensure Program Objectives:</b> Provides a prediction of success/speed of work when utilizing manual dexterity in various occupations involving gross movements of the hands, fingers, arms and other primarily “fingertip” dexterity tasks. Measures an individual’s ability to move hands, fingers, and arms (gross movement) and to control movements of small objects (fingertip dexterity).</p>				
Bennett Hand-Tool Dexterity Test	Hands-on Work Sample	Manual Dexterity	Nonverbal Any Language	None	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, one of the most reliable test manufacturers.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This task can be given in any language, and involves simple verbal directions. No formal education is necessary for testing.</p> <p><b>-Fair/Accurate Results:</b> Validated and normed on employees within work settings involving use of large mechanical hand tools.</p> <p><b>-Ensure Program Objectives:</b> This work sample provides a measure of eye-hand coordination and use of ordinary mechanic’s tools, helpful when entering formal training and/or occupations.</p>				
Career Ability Placement Survey (CAPS)	Paper/Pencil	Aptitudes	English Spanish	6 <sup>th</sup> Grade	60 min
Narrative Description:	<p><b>-Reliability:</b> Published by EdITS/Educational and Industrial Testing Service, a nationally recognized test manufacturer.</p>				

	<p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Can be given in both English and Spanish, and emphasizes self-awareness via skills associated with a number of vocational fields.</p> <p><b>-Fair/Accurate Results:</b> This index provides an accurate reflective of various aptitudes related to essential job functions. It is generally utilized in conjunction with the COPSsystem, providing continuity between interests and actual skills.</p> <p><b>-Ensure Program Objectives:</b> This survey was designed to measure abilities as they relate to careers and provides normed scores associated with various job interest clusters, ensuring proper entry level into formal training levels and/or employment settings.</p>				
Mechanical Aptitudes	Paper/Pencil	Mechanical Aptitude	English	6 <sup>th</sup> Grade	40 min
Narrative Description:	<p><b>-Reliability:</b> Published by General Dynamics Information Technology (formerly known as Vangent), one of the most reliable test manufacturers throughout the United States.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Most of the test is pictorial in nature, with pictures of tools, diagrams and spatial relations, thus assisting with minimizing literacy and socio-cultural issues.</p> <p><b>-Fair/Accurate Results:</b> This test is comprised of three separate tests of mechanical ability: mechanical knowledge, space relations, and shop arithmetic. Accuracy is obtained by breaking down the general aptitudes of overall mechanical skills.</p> <p><b>-Ensure Program Objectives:</b> This test measures ability to learn and succeed in an industrial, mechanical or maintenance position, while offering an estimate of the individual's mechanical aptitude for both formal training and employment.</p>				

### Interest Inventories

Name & Brief Description of Instruments	Type (e.g., paper & pencil, audio,	Characteristics (what it measures,	Language Availability of	Minimum Reading Proficiency	Estimated time required per referred
---	------------------------------------	------------------------------------	--------------------------	-----------------------------	--------------------------------------

	online, computer assisted)	purpose or function)	Assessment Instruments	Level Required for Each Language	participant to complete each instrument
Career Occupational Preference System (COPS) + (SPOC-Spanish)	Paper/Pencil	Vocational Interest	English Spanish	6 <sup>th</sup> Grade	60 min
Narrative Description:	<p><b>-Reliability:</b> Published by EdITS/Educational and Industrial Testing Service, a nationally recognized test manufacturer.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test was designed to measure interests as they relate to careers using simplified language in both English and Spanish, and emphasizes self-awareness via a reflection of interests broken into fourteen career clusters that correlate to all jobs listed by the Department of Labor.</p> <p><b>-Fair/Accurate Results:</b> This index provides a graphic pictorial view of an individual's average, above average, and below average interest levels based on self-described occupational likes and dislikes. It is generally utilized in conjunction with the COPSsystem, providing continuity between interests and actual skills.</p> <p><b>-Ensure Program Objectives:</b> Provides normed scores associated with various job interest clusters, ensuring proper entry level into formal training levels and/or employment settings involving similar likes and dislikes.</p>				
California Occupational Preference System Pictorial (COPS-P)	Paper/Pencil	Vocational Interest	Nonverbal Any Language	None	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by EdITS/Educational and Industrial Testing Service, a nationally recognized test manufacturer.</p>				

	<p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Was designed to measure career interest for persons with reading or language difficulties and is given pictorially, therefore sensitive to all types of learning, literacy, and socio-cultural sensitivity issues.</p> <p><b>-Fair/Accurate Results:</b> This index provides a graphic pictorial view of an individual's average, above average, and below average interest levels based on self-described occupational likes and dislikes. It is generally utilized in conjunction with the COPSystem, providing continuity between interests and actual skills.</p> <p><b>-Ensure Program Objectives:</b> Provides normed scores associated with various job interest clusters, ensuring proper entry level into formal training levels and/or employment settings involving similar likes and dislikes.</p>				
Reading-Free Vocational Interest Inventory	Paper/Pencil	Vocational Interest	Nonverbal Any Language	None	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by Elbern Publications. This psychometric presents pictorial activities of individuals engaged in work tasks and clearly illustrates artist-drawn job tasks.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> The non-reading feature of the inventory requires no verbal symbols or written statements for interpretation by the participant. Career pictorial illustrations with occupational significance are presented. It circumvents the decoding and reading comprehension barrier for those individuals with limited and verbal or reading ability.</p> <p><b>-Fair/Accurate Results:</b> Is a non-reading vocational preference inventory for use with individuals with mental retardation, learning disabilities, the disadvantaged and regular classrooms students.</p> <p><b>-Ensure Program Objectives:</b> This psychometric was developed to provide systematic information on the range of vocational interest patterns of a special needs individual who is struggling with learning disabilities, other disadvantages, as well as providing vocational interest information on the participant.</p>				

Work Values Inventory	Paper/Pencil	Work Values	English	6 <sup>th</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by Psychological Assessment Resources, Inc. (PAR) a noted test publisher/distributor for decades across the United States.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Can be given in English and emphasizes self-awareness via work values associated with a number of vocational fields.</p> <p><b>-Fair/Accurate Results:</b> This questionnaire is a career exploration and job selection tool developed to asses an individual’s work values (also referred to as vocational needs). These self-chosen values assist in determining an individual’s attitude, choice and actions related to the workplace, and also influence an individual’s choice of work environment. Work values (and definitions) chosen by include: Achievement, Support, Independence, Relationships and Working Conditions.</p> <p><b>-Ensure Program Objectives:</b> This psychometric was developed to provide systematic information on the specific work values of an individual in order to assist with proper selection of employment goals that best fit with overall interest levels, academics, personality and achievement.</p>				
Working Styles Assessment	Paper/Pencil	Work Styles	English	6 <sup>th</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by Psychological Assessment Resources, Inc. (PAR) a noted test publisher/distributor for decades across the United States.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Can be given in English and emphasizes self-awareness via work styles associated with a number of vocational fields.</p> <p><b>-Fair/Accurate Results:</b> This questionnaire is a career exploration tool that assists in understanding and better identifying jobs that may be a good for the individual; ones that the individual would enjoy and one in which they would excel. Work styles (and definitions) include: Drive, Interpersonal Skill, Adjustment, Responsibility and Problem Solving Skill.</p> <p><b>-Ensure Program Objectives:</b> This psychometric was developed to provide systematic information on the specific work styles of an individual in order to assist with proper selection of</p>				

	employment goals that best fit with overall interest levels, academics, personality and achievement.				
Myers-Briggs Type Indicator	Paper/Pencil	Personality Type	English	6 <sup>th</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by CPP Inc., and is one of the most widely purchased longest utilized personality measures both nationally and internationally. It is based on the theory of Carl Jung.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Since it is used both nationally and internationally, has been published in numerous languages and various lengths (from shorter versions to longer versions that detail specifics).</p> <p><b>-Fair/Accurate Results:</b> Provides a four letter personality preference that allows an individual to match their personality type with job clusters, interests, workers, and details of strengths and weaknesses within an employment setting.</p> <p><b>-Ensure Program Objectives:</b> This inventory is a psychometric questionnaire designed to measure psychological preferences in how people perceive the world and make decisions. Designed for "the identification of basic preferences on each of the four dichotomies specified or implicit in Jung's theory" and "the identification and description of the 16 personality types that result from interactions among the preferences."</p>				
Fresno County Demand Occupation List	Paper/Pencil	Vocational Interest	English Spanish Hmong	6 <sup>th</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by Foster Assessment Center &amp; Testing Service, Inc. (FACTS) from a compilation of Jobs Most Often Obtained from O*NET Publications via the Bureau of Labor Statistics and Department of Labor.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This list breaks down jobs most often in demand within the County of Fresno on an easy to read chart providing information mandated training, physical demands, entry level wage, and cross correlational information to various other occupations of similar interests.</p>				

	<p><b>-Fair/Accurate Results:</b> This checklist classifies jobs by the same career clusters as the COPS and the Self-Directed Search, and is regularly updated via Department of Labor standards.</p> <p><b>-Ensure Program Objectives:</b> Is an accurate reflection of actual jobs within the County of Fresno and it utilizes to compare obtained assessment skills to the demands of the County’s employers.</p>				
Self-Directed Search (SDS), 5 <sup>th</sup> Edition	Paper/Pencil	Vocational Interest	English Spanish	6 <sup>th</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by Psychological Assessment Resources, Inc. (PAR) a noted test publisher/distributor for decades across the United States.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Based on John Holland’s Vocational Preference Inventory and resultant classification codes, this psychometric provides a self-assessed insight into how individual interests correspond to personality types and occupations.</p> <p><b>-Fair/Accurate Results:</b> Results are obtained through self-assessment and therefore, provide insight into the individual’s abilities, hobbies, interests, and resultant educational/employment opportunities.</p> <p><b>-Ensure Program Objectives:</b> This inventory was designed to identify a person's particular activities, competencies, and self-estimates compared with various occupational groups.</p>				
Career Orientation Placement & Evaluation Survey (COPES)	Paper/Pencil	Work Values (SP)	English Spanish	6 <sup>th</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by EdITS/Educational and Industrial Testing Service, a nationally recognized test manufacturer.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This psychometric is specifically designed to determine an individual’s work values and self-awareness in relation to their career development, leading to an increased sensitivity to learning, literacy, and socio-cultural sensitivity issues.</p>				

	<p><b>-Fair/Accurate Results:</b> This index provides a self-assessed determination, therefore providing fair and accurate results for that individual. It is generally utilized in conjunction with the COPS system, providing continuity between interests and actual skills.</p> <p><b>-Ensure Program Objectives:</b> This test was designed to measure values having a demonstrated effect on vocational motivation. These values are associated with various job interest clusters, ensuring proper matching to an individual's skills (CAPS) and interests (COPS).</p>				
Wide Range Interest and Occupation Test (WRIOT)	Paper/Pencil	Vocational Interest (NV)	Nonverbal Any Language	None	30 min
Narrative Description:	<p><b>-Reliability:</b> This index is published by JASTAK Assessment Systems.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This index is given pictorially, and allows insight into various employment clusters. It breaks down personality insight, therefore allows insight into the desired risk, ambition, sedentariness, and skill level.</p> <p><b>-Fair/Accurate Results:</b> Since this is a self-assessed questionnaire, results are accurate for that individual's view of their interests and opinions.</p> <p><b>-Ensure Program Objectives:</b> This psychometric assists in determining interests in both employment and formal training.</p>				

### Background Information Inventories

Name & Brief Description of Instruments	Type (e.g., paper & pencil, audio, online, computer assisted)	Characteristics (what it measures, purpose or function)	Language Availability of Assessment Instruments	Minimum Reading Proficiency Level Required for Each Language	Estimated time required per referred participant to complete each instrument
---	---	---	---	--	--

Personal Data Form (PDF)	Paper/Pencil	Background	English, Spanish, Vietnamese, Hmong	1 <sup>st</sup> Grade	20 min
Narrative Description:	<p><b>-Reliability:</b> This index is a self-assessed description of the participant’s educational history, work history, current barriers/strengths, medication usage, ect. Each participant meets with the assessor to review the PDF in its entirety.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> If the participant has any difficulty writing or reading this instrument, the assessor will enter all data for the individual. Each question is thoroughly discussed to ensure accuracy.</p> <p><b>-Fair/Accurate Results:</b> Since this is a self-assessment that is reviewed and discussed by the assessor, it provides accurate results in as much as the participant is willing to share.</p> <p><b>-Ensure Program Objectives:</b> Assists in obtaining numerous pieces of data necessary for the assessment process.</p>				
Barriers to Employment Success Inventory (BESI)	Paper/Pencil	Employment Barriers & Strategies	English	6 <sup>th</sup> Grade	45 min
Narrative Description:	<p><b>-Reliability:</b> Published by JIST/EMC Publishing. This test provides a standardized approach for counselors to use in identifying, understanding, and finding solutions to barriers to successful employment.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> Since there are no right or wrong answers to this psychometric, the assessor is able to assist the participant with any barriers they may find regarding learning, literacy, language and socio-cultural issues.</p> <p><b>-Fair/Accurate Results:</b> Since this is a self-assessment that is reviewed and discussed by the assessor, it provides accurate results in as much as the participant is willing to share.</p> <p><b>-Ensure Program Objectives:</b> This self-assessed questionnaire is designed to help individuals identify their major and minor barriers to obtaining a job or succeeding in their employment. It is a</p>				

	counseling tool intended to initiate a dialogue concerning the person's barriers to successful employment and ways in which those barriers can be overcome.				
Language Acculturation Meter (LAM)	Paper/Pencil	English Language Acculturation	English Spanish	1 <sup>st</sup> Grade	15 min
Narrative Description:	<p><b>-Reliability:</b> Published by Psychological Assessment Resources, Inc. (PAR) a noted test publisher/distributor for decades across the United States.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This inventory can be given in both Spanish and English, and assists in providing a framework for testing to assist in choosing appropriate assessment instruments and interpret test results.</p> <p><b>-Fair/Accurate Results:</b> Since this is a self-assessment, it provides accurate results for that participant.</p> <p><b>-Ensure Program Objectives:</b> This instrument measures how well participants believe they understand and how accurately they comprehend English in everyday usage, when speaking, and when in a classroom situation.</p>				
Time Use Survey	Paper/Pencil	Time Management	English	5 <sup>th</sup> Grade	10 min
Narrative Description:	<p><b>-Reliability:</b> Published by Los Angeles County Office of Education (LACOE) , the largest regional educational agency in the nation, providing over 400 educational, business, and instructional-technology services.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This inventory can be given in both Spanish and English, and assists in determining the participant's time use techniques, breaking down if an individual learns via visual, auditory or tactile styles.</p> <p><b>-Fair/Accurate Results:</b> Since this is a self-assessment, it provides accurate results for that participant.</p>				

	<p><b>-Ensure Program Objectives:</b> This time management inventory is comprised of self-assessment management techniques that assist in determining strengths and barriers prior to determining employment and/or formal training recommendations.</p>				
Learning and Study Strategies Inventory (LASSI)	Paper/Pencil	Learning & Study Strategies	English	5 <sup>th</sup> Grade	30 min
Narrative Description:	<p><b>-Reliability:</b> This index is published by H&amp;H Publishing Company, Inc., a noted test manufacturing company.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This index was designed to assess how an individual learns, studies, and feels about learning and studying. Therefore, sensitivity to language and learning style is stressed.</p> <p><b>-Fair/Accurate Results:</b> This index was designed to assess students' awareness about and use of learning and study strategies related to skill, will and self-regulation components of strategic learning. This index provides standardized scores and national norms with strong validity quotients and accurate standard error of measurements.</p> <p><b>-Ensure Program Objectives:</b> This test provides students with a diagnosis of their strengths and weakness, compared to other college students, in the areas covered by the ten scales, and it is prescriptive in that it provides feedback in the areas where students may be weak and need to improve their knowledge, skills, attitudes, motivations, and beliefs.</p>				
Learning Style Inventory	Paper/Pencil	Learning Style Preference	English, Spanish, Vietnamese	6 <sup>th</sup> Grade	10 min
Narrative Description:	<p><b>- Reliability:</b> Published by Los Angeles County Office of Education (LACOE) , the largest regional educational agency in the nation, providing over 400 educational, business, and instructional-technology services.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This psychometric is sensitive to learning, as it breaks down learning styles into seeing, hearing, and/or doing. It can be given in three different languages, and is socio-culturally sensitive since a self-assessment.</p>				

	<p><b>-Fair/Accurate Results:</b> The self-assessment provides accurate results for that participant.</p> <p><b>-Ensure Program Objectives:</b> This self-assessment assists with program objectives as it defines three major types of learning styles in correlation with the mandated learning for employment and/or formal training settings.</p>
--	---

### Learning Disabilities Inventories

Name & Brief Description of Instruments	Type (e.g., paper & pencil, audio, online, computer assisted)	Characteristics (what it measures, purpose or function)	Language Availability of Instruments	Minimum Reading Proficiency Level Required for Each Language	Estimated time required per referred participant to complete each instrument
Woodcock-Johnson IV Achievement & Cognitive Abilities	Paper/Pencil	Learning Disabilities Identification	English Spanish	1 <sup>st</sup> Grade	5 hours
Narrative Description:	<p><b>-Reliability:</b> Published by Riverside Publishing, one of the most reliable test manufacturers throughout the United States. Normative data are based on a single sample that was administered both cognitive and achievement tests, which allows the batteries to function together as an accurate and valid diagnostic system for evaluating domain-specific skills with related cognitive abilities as well as traditional ability/achievement discrepancies. Is one of the foremost tests utilized across the nation in the documentation and identification of learning disabilities.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> The WJ III is ideally suited to increase the participation of students with disabilities in assessment and accountability systems, which allows for sensitivity to the limitations to different impairments that might impose on a participant's abilities and behavior.</p>				

	<p><b>-Fair/Accurate Results:</b> The WJ III batteries were designed to provide the most valid methods for determining patterns of strengths and weaknesses based on actual discrepancy norms.</p> <p><b>-Ensure Program Objectives:</b> These two distinct co-normed batteries are a comprehensive set of individually administered tests measuring general intellectual ability, specific cognitive abilities, oral language, and academic achievement.</p>				
<p>Batería III Woodcock-Muñoz (Spanish)</p>	<p>Paper/Pencil</p>	<p>Learning Disabilities Identification</p>	<p>Spanish</p>	<p>1<sup>st</sup> Grade</p>	<p>5 hours</p>
<p>Narrative Description:</p>	<p><b>- Reliability:</b> Published by Riverside Publishing, one of the most reliable test manufacturers throughout the United States. Normative data are based on a single sample that was administered both cognitive and achievement tests, which allows the batteries to function together as an accurate and valid diagnostic system for evaluating domain-specific skills with related cognitive abilities as well as traditional ability/achievement discrepancies. Is one of the foremost tests utilized across the nation in the documentation and identification of learning disabilities.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> The WJ III is ideally suited to increase the participation of students with disabilities in assessment and accountability systems, which allows for sensitivity to the limitations to different impairments that might impose on a participant’s abilities and behavior. This revised version in the Spanish language allows cognitive and achievement levels to be evaluated while being sensitive to learning, language, and socio-cultural issues.</p> <p><b>-Fair/Accurate Results:</b> The WJ III batteries were designed to provide the most valid methods for determining patterns of strengths and weaknesses based on actual discrepancy norms.</p> <p><b>-Ensure Program Objectives:</b> These two distinct co-normed batteries are a comprehensive set of individually administered tests measuring general intellectual ability, specific cognitive abilities, oral language, and academic achievement.</p>				

BETA 4	Paper/Pencil	General Intellectual Ability	English Spanish	None	20 min
Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, one of the largest and most reliable test publishers within the United States. This test is one of the most widely utilized measures of cognitive processing and intellectual ability nationally, and is accepted both nationally and internationally.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This psychometric is pictorial, and attempts to determine cognitive processing/non-verbal learning ability, commencing with least difficult and ending in most difficult reasoning. Therefore, it is sensitive to learning and literacy. It is not socio-culturally bound, and norms are reflective of a non-cultural basis.</p> <p><b>-Fair/Accurate Results:</b> Reliability and validity quotients are extremely high, with a standard error of measurement inversely related to the reliability.</p> <p><b>-Ensure Program Objectives:</b> Provides a reliable measure of non-verbal intellectual ability, most often necessary to obtain prior to recommending both training and/or employment.</p>				
Test of Non-Verbal Ability (TONI 4)	Paper/Pencil	Non-Verbal Intelligence	Nonverbal Any Language	None	30 min
Narrative Description:	<p><b>-Reliability:</b> Published by PRO-ED. Derived scores are based on a standardized representative sampling, with regularly updated norms. Normative data are stratified by age, gender, geographic region, ethnicity and race. This test is an individually administered, norm-referenced instrument that uses abstract reasoning and figural problem solving to estimate general intellectual ability.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test was developed to assess aptitude, intelligence, abstract reasoning, and problem solving in a completely language-free format, and was designed in response for the need for an individually administered test of general intelligence with strong psychometric characteristics and a nonverbal, motor-reduced format that would make it possible to assess intelligence without the effects of a person's</p>				

	<p>linguistic or motor skills confounding the results and yielding a potentially inaccurate assessment of cognitive ability.</p> <p><b>-Fair/Accurate Results:</b> Normative data is representative of demographic changes in the U.S. population, with particular attention to the salient variables of ethnicity, race, gender, geographical region, parental education, and socioeconomic status which are known to influence performance on tests of cognitive ability.</p> <p><b>-Ensure Program Objectives:</b> This test was developed to assess aptitude, intelligence, abstract reasoning, and problem solving in a completely language-free format.</p>				
Raven Standard Progressive Matrices	Paper/Pencil	Pictorial Cognitive	Nonverbal Any Language	None	45 min
Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, one of the largest and most reliable test publishers within the United States. Standard deviations and error of measurements are updated to reflect the population, both nationally and internationally.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> As a non-verbal measure, the test also provides a fairer measure of ability for individuals from different cultures because it is not influenced by language differences. This helps reduce cultural bias in your employee evaluations—an important benefit in today’s multicultural society and global workforce.</p> <p><b>-Fair/Accurate Results:</b> This test assesses skills essential for professionals, managers, and high-flyers, including advanced observation and clear-thinking skills, efficient problem solving, abstract reasoning, and the ability to learn.</p> <p><b>-Ensure Program Objectives:</b> This test is an untimed, non-verbal measure of cognitive processing, perception, thinking skills and abstract reasoning. It is commonly used for supervisory/entry level management positions and mid-level individual contributor positions.</p>				
Reynolds Adaptable Intelligence Test – Nonverbal (RAIT)	Paper/Pencil	Pictorial Cognitive	Nonverbal Any Language	None	45 min

	<p><b>Reliability:</b> Published by Psychological Assessment Resources, Inc. (PAR) a noted test publisher/distributor for decades across the United States.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> As a non-verbal measure, the test also provides a fairer measure of ability for individuals from different cultures because it is not influenced by language differences. This helps reduce cultural bias in your employee evaluations—an important benefit in today’s multicultural society and global workforce.</p> <p><b>-Fair/Accurate Results:</b> This test provides a measure of crystallized intelligence, fluid intelligence, quantitative intelligence, total intelligence and a total battery intelligence.</p> <p><b>-Ensure Program Objectives:</b> This test is a timed, non-verbal measure of intelligence. It is designed for group or individual administration that has been standardized for use with examinees ages 10 to 75 years.</p>				
Personnel Tests for Industry (PTI) - Oral Directions Test	Paper/Pencil	Listening Cognitive	English Spanish	4 <sup>th</sup> Grade	20 min
Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, one of the largest and most reliable test publishers within the United States.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This oral presentation is within controlled timing, and eliminates a required minimum reading level.</p> <p><b>-Fair/Accurate Results:</b> This psychometric is a recorded, wide-range test of general mental ability, designed to be simple, valid, and practical for use in testing adolescent and adults groups.</p> <p><b>-Ensure Program Objectives:</b> This psychometric assess’ an individual’s ability to follow directions presented orally, a requirement of many employment and training situations. It can also be used as a selection tool to predict performance in a variety of vocational and technical training settings.</p>				
Watson-Glaser Critical Thinking Appraisal	Paper/Pencil	Cognitive	English	9 <sup>th</sup> Grade	30 min

Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, one of the largest and most reliable test publishers within the United States.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> There are two forms of this index, Form A and Form B which allow alternate scores, increasing sensitivity to learning. Norms take into account socio-cultural and language issues.</p> <p><b>-Fair/Accurate Results:</b> Reliability, accuracy, and precision of this index is demonstrated by the correlational coefficient and the standard error of measurement.</p> <p><b>-Ensure Program Objectives:</b> This test is designed to measure critical thinking abilities which are used to predict performance in a variety of educational settings and executive, managerial, supervisory, administrative, and technical occupations.</p>				
Thurston Test of Mental Alertness	Paper/Pencil	Cognitive	English	9 <sup>th</sup> Grade	20 min
Narrative Description:	<p><b>-Reliability:</b> Published by General Dynamics Information Technology (formerly known as Vangent). The developer of the instrument, L.L. Thurstone has been recognized as one of America's leading specialists in the field of psychological assessment. Derived scores are based on a standardized representative sampling, with regularly updated norms.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This test has two equivalent forms, Form A and Form B, which allows for retesting without the effect of item recall on the second score. This increases sensitivity to learning, and norms take into account socio-cultural and language issues.</p> <p><b>-Fair/Accurate Results:</b> This test assesses four job-related tasks relating to educational and industrial settings. These include adjusting to new situations, learning new skills quickly, understanding complex or subtle relationships, and thinking flexibly. Measures of each of these tasks are necessary in order to fairly and accurately evaluate decisions regarding job selection, job placement, and/or job performance.</p>				

	<p><b>-Ensure Program Objectives:</b> This test measures general mental ability, an individual’s capacity to acquire new knowledge and skills and apply them to problem solving, and individual differences in ability to learn, comprehend, and perform mental tasks of varying types and complexity.</p>
--	--

**Other Types of Inventories**

Name & Brief Description of Instruments	Type (e.g., paper & pencil, audio, online, computer assisted)	Characteristics (what it measures, purpose or function)	Language Availability of Assessment Instruments	Minimum Reading Proficiency Level Required for Each Language	Estimated time required per referred participant to complete each instrument
Dvorine Color Plates	Visual	Color Discrimination	Nonverbal Any Language	None	10 min
Narrative Description:	<p><b>-Reliability:</b> Published by Pearson, one of the most reliable test manufacturers throughout the United States.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This is a color-blindness test that does not require advanced levels of learning, literacy and is not bound my socio-cultural issues.</p> <p><b>-Fair/Accurate Results:</b> Provides an accurate and fair indication of protanoid and deuteranoid color sensitivity, as well as red/green defective color sight and color saturation levels.</p> <p><b>-Ensure Program Objectives:</b> This test measures color blindness and color sensitivity, a skill utilized in numerous job fields, and is mandatorily necessary to determine prior to employment recommendations.</p>				

Vision Test (Near) at 16 inches	Visual	Vision Ratings	Nonverbal Any Language	None	5 min
Narrative Description:	<p><b>-Reliability:</b> Published by Graham-Field.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This is a standard eye chart and is sensitive to these issues, as it can be given with English lettering or pictorial/directional graphics.</p> <p><b>-Fair/Accurate Results:</b> Provides an indication of the ability to see with normal visual distance.</p> <p><b>-Ensure Program Objectives:</b> This provides an accurate picture of the participant’s ability to visualize objects nearby, including close/fine visual acuity, utilized when reading and performing small tasks.</p>				
Vision Test (Far) at 20 feet	Visual	Vision Ratings	Nonverbal Any Language	None	5 min
Narrative Description:	<p><b>-Reliability:</b> Published by Graham-Field.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> This is a standard eye chart and is sensitive to these issues, as it can be given with English lettering or pictorial/directional graphics.</p> <p><b>-Fair/Accurate Results:</b> Provides an indication of the ability to see with normal visual range.</p> <p><b>-Ensure Program Objectives:</b> This provides an accurate picture of the participant’s ability to visualize far distance, utilized during training, employment and daily life.</p>				
Narrative description <i>for all below listed SkillCheck indices. Note the differences in type, characteristics, language, reading level and time are listed for each task.</i>	<p><b>-Reliability:</b> Published by SkillCheck, these various types of computer programs measure fluency, ability and competencies for each program.</p> <p><b>-Sensitive to learning, literacy language and socio-cultural issues:</b> These computer-based tasks are sensitive as they measure competency in various computer programs including Windows, Microsoft WORD, Microsoft PowerPoint, Microsoft Access, Microsoft Excel, Microsoft Outlook and typing speed.</p>				

	<p><b>-Fair/Accurate Results:</b> This index provides correct words per minute and competency for each individual program based on requested performance functions as if the participant were using real software.</p> <p><b>-Ensure Program Objectives:</b> This interactive simulation of the software provides insight into the participant's computer skills and aptitudes, which is relevant for numerous training and/or employment situations.</p>				
SkillCheck – Windows 7 XP (Microsoft)	Computer	Computer program level of knowledge	English	6 <sup>th</sup> Grade	15 min
SkillCheck – Word 2010 (Microsoft)	Computer	Computer program level of knowledge	English	6 <sup>th</sup> Grade	15 min
SkillCheck – Excel 2010 (Microsoft)	Computer	Computer program level of knowledge	English	6 <sup>th</sup> Grade	15 min
SkillCheck–PowerPoint 2010 (Microsoft)	Computer	Computer program level of knowledge	English	6 <sup>th</sup> Grade	15 min
SkillCheck – Access 2010 (Microsoft)	Computer	Computer program level of knowledge	English	6 <sup>th</sup> Grade	15 min
SkillCheck – Outlook 2010 E-Mail	Computer	Computer program level of knowledge	English	6 <sup>th</sup> Grade	15 min
SkillCheck Typing Speed	Computer	Correct Words per Minute	English	6 <sup>th</sup> Grade	15 min

## FRESNO COUNTY DEMAND OCCUPATIONS LIST 2022 – 2023

Sample Excerpt from Full  
Demand Occupations List

The following listing includes Labor Market Information on selected occupations for training and/or placement of CalWORKs participants. The California Employment Development Department's *Fresno County's Occupations with the Most Job Openings* (2018 – 2028) list and *Fresno County's Occupational Employment Projections* (2018 – 2028) list were the primary sources of information utilized in creating this demand list. Additionally, other California Employment Development Department labor market information was reviewed, including the *Fresno County Fastest Growing Occupations* (2018 – 2028) list and other Fresno County labor market data. This information was utilized to produce a list of occupations for consideration, which would:

- Identify occupations projected to have positive growth potential in 2022 – 2023; and
- Be acceptable for consideration for employment and training plans within Fresno County.

The following demand list presents the jobs by:

- Table of Contents, which organizes the occupations by career cluster occupational field according to the Career Occupational Preference System;
- The Dictionary of Occupational Titles (DOT) code and O\*NET number;
- Job description and comments relating to hiring requirements;
- Identification if placement is only through direct placement or with on-the-job training;
- Identification of occupations that require licensing by the State of California;
- Average entry level hourly wages; and
- Indication if employers have strong preferences for a high school diploma/GED certificate.

Foster Assessment Center & Testing Service, Inc. compiled this data. If you have any questions or comments, please contact our Fresno vocational assessment center or our administrative office in Thousand Oaks.

*Administrative Office: 516 Pennsfield Place, Suite 108, Thousand Oaks, CA 91360 • (805) 497-1685 • Fax: (805) 497-2525  
E-mail: [ThousandOaks@FosterAssessment.com](mailto:ThousandOaks@FosterAssessment.com) • Website: [www.fosterassessment.com](http://www.fosterassessment.com)*

- \* Anaheim – (714) 635-5370 \* Fax: (714) 635-5372 \* e-mail: [Anaheim@FosterAssessment.com](mailto:Anaheim@FosterAssessment.com).
- \* Bakersfield – (661) 396-7863 \* Fax: (661) 396-7865 \* e-mail: [Bakersfield@FosterAssessment.com](mailto:Bakersfield@FosterAssessment.com)
- \* Fresno – (559) 721-7488 \* Fax: (559) 721-7589 \* e-mail: [Fresno@FosterAssessment.com](mailto:Fresno@FosterAssessment.com)
- \* Long Beach – (562) 570-3788 \* Fax: (562) 570-3652 \* e-mail: [LongBeach@FosterAssessment.com](mailto:LongBeach@FosterAssessment.com)
- \* Los Angeles – (213) 353-0782 \* Fax: (213) 353-0792 \* e-mail: [LosAngeles@FosterAssessment.com](mailto:LosAngeles@FosterAssessment.com)
- \* Palmdale – (661) 272-9397 \* Fax: (661) 272-0181 \* e-mail: [Palmdale@FosterAssessment.com](mailto:Palmdale@FosterAssessment.com)
- \* Northridge – (818) 996-2015 \* Fax (818) 996-6531 \* e-mail: [Northridge@FosterAssessment.com](mailto:Northridge@FosterAssessment.com)

## CODING SYSTEM EXPLANATION

**D.O.T.** = DICTIONARY OF OCCUPATIONAL TITLES. A publication by the U.S. Department of Labor, utilizes a 7-digit code number for every job.

**O\*NET** = OCCUPATIONAL INFORMATION NETWORK. A publication by the U.S. Department of Labor, a new computerized database of information on occupations, utilizes a 6-digit code to classify occupations.

**Direct Placement or On-the-Job-Training** indicates that vocational classroom training is not available to WIA participants for this position. Direct placement (DP) or on-the-job training (OJT) with the employer are the only options.

**H.S. Diploma/GED preference** indicates that employers are reluctant to hire an applicant for this occupation (even if they have completed vocational training) unless they graduated from high school or received a GED.

**Licensed Occupation:** This occupation requires a license by the state of California. To become licensed, there will be applicable licensing and exam fees. For more information on the licensing requirements of the occupation, please speak with your evaluator or refer to the following web site: [http://www.acinet.org/acinet/licensedoccupations/lois\\_occ.asp](http://www.acinet.org/acinet/licensedoccupations/lois_occ.asp).

**Current Minimum Wage:** California's current minimum wage is \$14.00 per hour for employers with 25 or fewer employees and \$15.00 per hour for employers with 26 or more employees (effective on January 1, 2022).

## TABLE OF CONTENTS - FRESNO COUNTY DEMAND OCCUPATIONS LIST

SCIENCE PROFESSIONAL (INVESTIGATIVE ON SDS) .....	5	OUTDOOR .....	18
Computer User Support Specialist.....	5	Farmworker & Laborer, Crop, Nursery & Greenhouse.....	18
Network & Computer Systems Administrator.....	5	Grader and Sorter, Agricultural Products .....	18
SCIENCE SKILLED .....	6	Landscaping and Groundskeeping Worker.....	18
Dental Assistant.....	6	Veterinary Assistant & Animal Caretaker .....	18
Diagnostic Medical Sonographer / Ultrasound Technician .....	6	Yard Worker.....	18
Medical Assistant .....	6	BUSINESS PROFESSIONAL (ENTERPRISING ON SDS) .....	19
Pharmacy Technician .....	7	Accountant & Auditor .....	19
Phlebotomist.....	7	General and Operations Manager .....	19
Radiologic Technologist / Technician .....	7	Human Resources Specialist .....	19
Respiratory Therapist .....	7	Market Research Analyst and Marketing Specialist.....	20
Surgical Technician / Technologist .....	8	Sales Manager .....	20
TECHNOLOGY PROFESSIONAL.....	9	BUSINESS SKILLED (ENTERPRISING ON SDS).....	21
Computer-Aided Drafting & Design Drafter.....	9	First-Line Supervisor of Retail Sales Workers .....	21
Software Developer, Applications.....	9	Insurance Sales Agent .....	21
TECHNOLOGY SKILLED (REALISTIC ON SDS) .....	10	Parts Salesperson .....	21
Automobile Service Technician & Mechanic.....	10	Real Estate Sales Agent.....	21
Bus & Truck Mechanic / Diesel Engine Specialist.....	10	Salesperson, Retail .....	21
Carpenter .....	10	Sales Representative, Wholesale & Manufacturing (Except Technical & Scientific Products).....	22
Computer Numeric Controlled (CNC) Machinist .....	10	Solar Sales Representative & Assessor .....	22
Construction Laborer.....	11	CLERICAL (CONVENTIONAL ON SDS) .....	23
Construction Manager .....	11	Administrative Assistant & Executive Secretary (Except Legal, Medical, and Executive).....	23
Electrician.....	11	Bookkeeping, Accounting and Auditing Clerk.....	23
First-Line Supervisor of Production & Operating Workers .....	11	Cashier.....	23
Forklift Operator (Industrial Truck/Tractor Operator) .....	12	Counter and Rental Clerk .....	23
Heating, Air Conditioning & Refrigeration Mechanic & Installer .....	12	Customer Service Representative .....	24
Heavy & Tractor- Trailer Truck Driver, Class A .....	12	Dispatcher (Except Police, Fire, and Ambulance).....	24
Industrial Machinery Mechanic (Maintenance Mechanic).....	12	First-Line Supervisor of Office and Administrative Support Workers.....	24
Inspector, Tester, Grader, Sorter, Sampler and Weigher .....	13	General Office Clerk .....	24
Laborer & Freight, Stock and Material Mover, Hand .....	13	Grocery / Produce Clerk .....	24
Light Truck or Delivery Service Driver .....	13	Medical Billing Clerk (Billing Clerk).....	24
Machine Tool Setter, Operator & Tender (metal & plastic).....	14	Medical Secretary .....	25
Maintenance and Repair Worker, General .....	14	Office Helper (Assistant).....	25
Solar Installer / Technician.....	14	Receptionist & Information Clerk .....	25
Warehouse Laborer .....	14	Shipping, Receiving & Inventory Clerk .....	25
Welder, Cutter, Solderer & Brazier .....	15	Stocker & Order Filler .....	25
CONSUMER ECONOMICS .....	16	Teller .....	25
Baker, Pastry Chef.....	16	COMMUNICATION (ARTISTIC ON SDS).....	26
Cook, Fast Food.....	16	Paralegal, Legal Assistant.....	26
Cook, Restaurant .....	16	ARTS PROFESSIONAL.....	26
Cook, Short Order .....	16	No Demand Occupations Listed.....	26
Dietary / Culinary Aide .....	16	ARTS SKILLED (ARTISTIC ON SDS).....	26
Food Preparation and Serving Worker .....	16	No Demand Occupations Listed.....	26
Food Preparation Worker .....	17		
First-Line Supervisor of Food Preparation & Serving Workers .....	17		

**SCIENCE PROFESSIONAL (INVESTIGATIVE ON SDS)**

DOT#/ O*NET#	JOB TITLE	JOB DESCRIPTION	AVERAGE ENTRY HOURLY WAGE	H.S. DIPL/GED PREF.
039.264-010 15-1232	<b>Computer User Support Specialist</b>	Provide technical assistance to computer users. Answer questions or resolve computer problems for clients in person, via telephone, or electronically. May provide assistance concerning the use of computer hardware and software, including printing, installation, word processing, electronic mail, and operating systems. <b>Education requirements vary. Some employers require a Bachelor's Degree, while others require some college, or only a high school diploma.</b>	18.00 to 20.00	Yes
032.262-010 15-1244	<b>Network &amp; Computer Systems Administrator</b>	Install, configure, and maintain an organization's local area network (LAN), wide area network (WAN), data communications network, operating systems, and physical and virtual servers. Perform system monitoring and verify the integrity and availability of hardware, network, and server resources and systems. Review system and application logs and verify completion of scheduled jobs, including system backups. Analyze network and server resource consumption and control user access. Install and upgrade software and maintain software licenses. May assist in network modeling, analysis, planning, and coordination between network and data communications hardware and software. Education requirements vary. <b>Some employers require an Associate's Degree or Apprenticeship Degree while others require a Bachelor's Degree.</b>	28.25 to 30.25	Yes

Sample Excerpt from Full Demand  
Occupations List Summary

## FRESNO COUNTY DEMAND LIST SUMMARY (2022 - 2023)

OCCUPATION	DOT	O*NET	AVG ENTRY WAGE	HS	REASONING	MATH	READING	SVP	Strength Factor**
Accountant & Auditor	160.162-018	13-2011	23.00 – 25.00	Y	75%ile +	13.0+	13-16	4-10 y	S
Activities Assistant (elderly care)	195.367-030	39-9032	14.25 – 16.25	Y	25-49%ile	4-6	7-8	Up to 30d	L
Administrative Assistant & Executive Secretary	169.167-010	43-6014	14.25 – 16.25	Y	75%ile+	7-8	13-16	2-4 y	S
Automobile Service Technician & Mechanic	620.261-010	49-3023	14.50 – 16.50	Y	50-74%ile	7-8	7-8	2-4 y	M
Baker, Pastry Chef	526.381-010	51-3011	14.00 – 16.00	Y	25-49%ile	4-6	4-6	2-4 y	H
Barista	317.684-010	35-3023	14.00 – 16.00	N	6-24%ile	1-3	1-3	Up to 30d	M
Behavioral Health Technician	079.374-026	29-2053	18.50 – 20.50	Y	50-74%ile	7-8	9-12	1-2 y	M
Bookkeeping/Accounting/Auditing Clerk	210.381-014	43-3031	14.50 – 16.50	Y	50-74%ile	7-8	7-8	2-4 y	S
Bus & Truck Mechanic / Diesel Engine Specialist	625.281-010	49-3031	15.00 – 17.00	Y	50-74%ile	7-8	7-8	2-4 y	H
Carpenter	860.381-022	47-2031	17.00 – 19.00	Y	50-74%ile	7-8	9-12	2-4 y	M
Cashier	211.362-010	41-2011	14.00 – 16.00	N	50-74%ile	7-8	7-8	6m-1 y	S
Childcare Worker	355.674-010	39-9011	14.00 – 16.00	Y	25-49%ile	1-3	4-6	30 d	M
Cleaner, Vehicles & Equipment	919.687-014	53-7061	14.00 – 16.00	N	6-24%ile	1-3	1-3	Short Demo	M
Computer Numeric Controlled (CNC) Machinist	600.280-022	51-4041	14.50 – 16.50	N	50-74%ile	9-12	9-12	2-4 y	M
Computer User Support Specialist	039.264-010	15-1232	18.00 – 20.00	Y	50-74%ile	7-8	9-12	2-4 y	M
Computer-Aided Drafting & Design Drafter	003.362-010	17-3011	17.75 – 19.75	Y	25-49%ile	7-8	7-8	6-12 m	L
Construction Laborer	869.687-026	47-2061	14.25 – 16.25	N	6-24%ile	1-3	1-3	Up to 30d	XH
Construction Manager	182.167-010	11-9021	34.00 – 36.00	Y	50-74%ile	9-12	9-12	2-4 y	L
Cook, Fast Food	313.374-010	35-2011	14.00 – 16.00	N	25-49%ile	4-6	4-6	6m-1 y	M
Cook, Restaurant	313.361-026	35-2014	14.00 – 16.00	N	25-49%ile	4-6	4-6	6m-1 y	M
Cook, Short Order	313.374-014	35-2015	14.25 – 16.25	N	25-49%ile	4-6	4-6	1-3 m	L
Correctional Officer & Jailer	372.667-018	33-3012	26.00 – 28.00	Y	25-49%ile	4-6	4-6	3-6 m	M
Counter and Rental Clerk	369.477-014	41-2021	14.00 – 16.00	Y	25-49%ile	4-6	4-6	1-3 m	L
Customer Service Representative	241.367-014	43-4051	14.00 – 16.00	Y	50-74%ile	7-8	9-12	6m-1 y	S
Dental Assistant	079.361-018	31-9091	14.50 – 16.50	Y	50-74%ile	7-8	9-12	1-2 y	L
Diagnostic Medical Sonographer / Ultrasound Technician	078.364-010	29-2032	29.00 – 31.00	Y	75%ile+	9-12	9-12	2-4 y	L
Dietary / Culinary Aide	319.677-014	29-2051	15.00 – 17.00	Y	25-49%ile	4-6	4-6	Short Demo	M
Dining Room & Cafeteria Attendant & Bartender Helper	311.677-014	35-9011	14.00 – 16.00	N	6-24%ile	1-3	4-6	30d-3 m	L

This Demand List Summary is the property of Foster Assessment Center & Testing Service, Inc. It includes demand list data from Fresno County.

In the above categories, as a guideline, DOL's "High School" and "Algebra" have been listed as 9-12. "College" and has been listed as 13-16. "Statistics" has been listed as 13.0+. "Graduate" has been listed as 16.0+. Reasoning scores have been translated to approximate percentile equivalents.

Strength Factor\*\* S = Sedentary (10#) L = Light (20#) M = Medium (50#) H = Heavy (100#) XH = Extra Heavy (100+#)

Minimum Wage: On 1/1/22, California's minimum wage increased to \$14.00 per hour for employers with 25 or fewer employees and to \$15.00 per hour for employers with 26 or more employees.



**CARF Accreditation Report**  
**for**  
**Foster Assessment Center &**  
**Testing Service, Inc.**

**Three-Year Accreditation**



**CARF International Headquarters**  
6951 E. Southpoint Road  
Tucson, AZ 85756-9407, USA

[www.carf.org](http://www.carf.org)

# Contents

[Executive Summary](#)

[Survey Details](#)

[Survey Participants](#)

[Survey Activities](#)

[Program\(s\)/Service\(s\) Surveyed](#)

[Representations and Constraints](#)

[Survey Findings](#)

[Program\(s\)/Service\(s\) by Location](#)

## About CARF

CARF is an independent, nonprofit accreditor of health and human services, enhancing the lives of persons served worldwide.

The accreditation process applies CARF's internationally recognized standards during an on-site survey conducted by peer surveyors. Accreditation, however, is an ongoing process that distinguishes a provider's service delivery and signals to the public that the provider is committed to continuous performance improvement, responsive to feedback, and accountable to the community and its other stakeholders.

CARF accreditation promotes providers' demonstration of value and Quality Across the Lifespan® of millions of persons served through application of rigorous organizational and program standards organized around the ASPIRE to Excellence® continuous quality improvement framework. CARF accreditation has been the recognized benchmark of quality health and human services for more than 50 years.

For more information or to contact CARF, please visit [www.carf.org/contact-us](http://www.carf.org/contact-us).

## **Organization**

Foster Assessment Center & Testing Service, Inc.  
516 Pennsfield Place, Suite 108  
Thousand Oaks, CA 91360

## **Organizational Leadership**

Andrea J. Foster, MA, CVE, PVE, ABVE, IPEC, CW, Chief Executive Officer  
Katie Foster, MA, Chief Operations Officer  
R. Craig Foster, CVE, PVE, Assessment Director/Operations Manager

## **Survey Number**

123606

## **Survey Date(s)**

November 13, 2019–November 15, 2019

## **Surveyor(s)**

Sharon L. Hailey, MS, Administrative  
John A. Ahman, MA, LADC, Program  
Kara L. Bhakuni, MS, CRC, PVE, Program

## **Program(s)/Service(s) Surveyed**

Comprehensive Vocational Evaluation Services

## **Previous Survey**

January 11, 2017–January 13, 2017  
Three-Year Accreditation

## **Accreditation Decision**

### **Three-Year Accreditation**

**Expiration: November 30, 2022**

# Executive Summary

This report contains the findings of CARF's on-site survey of Foster Assessment Center & Testing Service, Inc. conducted November 13, 2019–November 15, 2019. This report includes the following information:

- Documentation of the accreditation decision and the basis for the decision as determined by CARF's consideration of the survey findings.
- Identification of the specific program(s)/service(s) and location(s) to which this accreditation decision applies.
- Identification of the CARF surveyor(s) who conducted the survey and an overview of the CARF survey process and how conformance to the standards was determined.
- Feedback on the organization's strengths and recognition of any areas where the organization demonstrated exemplary conformance to the standards.
- Documentation of the specific sections of the CARF standards that were applied on the survey.
- Recommendations for improvement in any areas where the organization did not meet the minimum requirements to demonstrate full conformance to the standards.
- Any consultative suggestions documented by the surveyor(s) to help the organization improve its program(s)/service(s) and business operations.

## Accreditation Decision

On balance, Foster Assessment Center & Testing Service, Inc. demonstrated substantial conformance to the standards. Foster Assessment Center & Testing Service (FACTS) has a reputation for providing high-quality evaluation and testing services to consumers in eight locations throughout Southern California. The organization benefits from knowledgeable, hands-on leadership and well-trained personnel who ensure that the services provided are exceptionally practical and well organized. The environments in which the organization's services are provided are comfortable, well maintained, and reflective of attention to health and safety practices. FACTS is designed and operated to benefit the consumers. Consumers, rehabilitation counselors, caseworkers, and other stakeholders expressed a high level of satisfaction with the organization and its services and personnel. The organization's business functions and service delivery practices exemplify a commitment to the CARF standards, and its practices reflect that it embraces continuous quality improvement. The organization does have some opportunities for improvement, which can be found throughout the ASPIRE to Excellence standards sections. They include the expansion of the written ethical codes of conduct to include witnessing of legal documents; the comprehensive demonstration of corporate compliance practices; the conduct of an annual review or audit of the organization's financial statements; the comprehensiveness of documented competency-based training provided to personnel in various health and safety areas; the comprehensiveness of the written procedures regarding critical incidents; the implementation of procedures for training regarding infections, communicable diseases, and the appropriate use of universal precautions; and the consistent availability of complaint procedures to the consumers. The receptivity of the leadership and staff members to the consultation and other feedback provided during this survey instills confidence that FACTS possesses the willingness and capacity to bring it into full conformance to the standards.

Foster Assessment Center & Testing Service, Inc. appears likely to maintain and/or improve its current method of operation and demonstrates a commitment to ongoing quality improvement. Foster Assessment Center & Testing Service, Inc. is required to submit a post-survey Quality Improvement Plan (QIP) to CARF that addresses all recommendations identified in this report.

**Foster Assessment Center & Testing Service, Inc. has earned a Three-Year Accreditation.** The leadership team and staff are complimented and congratulated for this achievement. In order to maintain this accreditation, throughout the term of accreditation, the organization is required to:

- Submit annual reporting documents and other required information to CARF, as detailed in the Accreditation Policies and Procedures section in the standards manual.
- Maintain ongoing conformance to CARF's standards, satisfy all accreditation conditions, and comply with all accreditation policies and procedures, as they are published and made effective by CARF.

## Survey Details

### Survey Participants

The survey of Foster Assessment Center & Testing Service, Inc. was conducted by the following CARF surveyor(s):

- Sharon L. Hailey, MS, Administrative
- John A. Ahman, MA, LADC, Program
- Kara L. Bhakuni, MS, CRC, PVE, Program

CARF considers the involvement of persons served to be vital to the survey process. As part of the accreditation survey for all organizations, CARF surveyors interact with and conduct direct, confidential interviews with consenting current and former persons served in the program(s)/service(s) for which the organization is seeking accreditation. In addition, as applicable and available, interviews may be conducted with family members and/or representatives of the persons served such as guardians, advocates, or members of their support system.

Interviews are also conducted with individuals associated with the organization, as applicable, which may include:

- The organization's leadership, such as board members, executives, owners, and managers.
- Business unit resources, such as finance and human resources.
- Personnel who serve and directly interact with persons served in the program(s)/service(s) for which the organization is seeking accreditation.
- Other stakeholders, such as referral sources, payers, insurers, and fiscal intermediaries.
- Community constituents and governmental representatives.

### Survey Activities

Achieving CARF accreditation involves demonstrating conformance to the applicable CARF standards, evidenced through observable practices, verifiable results over time, and comprehensive supporting documentation. The survey of Foster Assessment Center & Testing Service, Inc. and its program(s)/service(s) consisted of the following activities:

- Confidential interviews and direct interactions, as outlined in the previous section.
- Direct observation of the organization's operations and service delivery practices.
- Observation of the organization's location(s) where services are delivered.

- Review of organizational documents, which may include policies; plans; written procedures; promotional materials; governing documents, such as articles of incorporation and bylaws; financial statements; and other documents necessary to determine conformance to standards.
- Review of documents related to program/service design, delivery, outcomes, and improvement, such as program descriptions, records of services provided, documentation of reviews of program resources and services conducted, and program evaluations.
- Review of records of current and former persons served.

## Program(s)/Service(s) Surveyed

The survey addressed by this report is specific to the following program(s)/service(s):

- Comprehensive Vocational Evaluation Services

A list of the organization’s accredited program(s)/service(s) by location is included at the end of this report.

## Representations and Constraints

The accreditation decision and survey findings contained in this report are based on an on-balance consideration of the information obtained by the surveyor(s) during the on-site survey. Any information that was unavailable, not presented, or outside the scope of the survey was not considered and, had it been considered, may have affected the contents of this report. If at any time CARF subsequently learns or has reason to believe that the organization did not participate in the accreditation process in good faith or that any information presented was not accurate, truthful, or complete, CARF may modify the accreditation decision, up to and including revocation of accreditation.

## Survey Findings

This report provides a summary of the organization’s strengths and identifies the sections of the CARF standards that were applied on the survey and the findings in each area. In conjunction with its evaluation of conformance to the specific program/service standards, CARF assessed conformance to its business practice standards, referred to as Section 1. ASPIRE to Excellence, which are designed to support the delivery of the program(s)/service(s) within a sound business operating framework to promote long-term success.

The specific standards applied from each section vary based on a variety of factors, including, but not limited to, the scope(s) of the program(s)/service(s), population(s) served, location(s), methods of service delivery, and survey type. Information about the specific standards applied on each survey is included in the standards manual and other instructions that may be provided by CARF.

## Areas of Strength

CARF found that Foster Assessment Center & Testing Service, Inc. demonstrated the following strengths:

- FACTS was founded in 1984 to support the need for vocational testing and evaluation in Southern California. The owners and staff members are recognized and commended for their ability to market, grow, and support the organization's unique, comprehensive services over a wide footprint.

- The organization's eight locations are attractive and accessible. Each location has been carefully selected and set up, and it is maintained to ensure that it supports appropriate testing environments and opportunities for unobtrusive observation, and is conducive to the provision of safe, high-quality services.
- FACTS' personalized comprehensive vocational evaluation services are characterized by practicality and are underpinned by consistent testing processes.
- The owners of FACTS are exceptionally knowledgeable and actively involved in the organization's operations as well as in the provision of direct services to consumers.
- FACTS benefits from tenured personnel who are friendly, knowledgeable in their field, highly credentialed, and dedicated to the organization. Staff members are knowledgeable regarding the application and appropriate use of a wide variety of evaluation tools as well as adaptations that enable the tools to be customized for each consumer.
- The organization encourages and supports staff members' professional development by offering education-related incentives, making continuing education units available that assist in maintaining and obtaining additional credentials, and providing quarterly training.
- FACTS appears to be financially sound and to have sufficient resources to maintain its programs and services. It is recognized for maintaining good relationships with funders and referral sources.
- FACTS is commended for designing a performance improvement system that not only guides the leadership in decision making, but also serves as an effective tool for communicating information to stakeholders about the organization's performance and activities. Its very well-presented graphs provide visual aids that facilitate understanding of the organization's demographics and progress as well as cost center information.
- A review of service delivery documentation revealed that staff members are fully engaged in the orientation and exit processes conducted for consumers. Each evaluation report is individualized to the consumer's performance, individual strengths, areas of need, and referral questions.
- The satisfaction-related feedback routinely obtained by FACTS from consumers, rehabilitation counselors, caseworkers, and other stakeholders is analyzed for trends and incorporated in strategic planning and organizational decision-making processes.
- Representatives of referral and/or funding sources in the eight locations in which FACTS provides services expressed a high level of satisfaction with the timely, thorough reports that are completed by the organization's well-qualified, knowledgeable personnel.

## Opportunities for Quality Improvement

The CARF survey process identifies opportunities for continuous improvement, a core concept of “aspiring to excellence.” This section of the report lists the sections of the CARF standards that were applied on the survey, including a description of the business practice area and/or the specific program(s)/service(s) surveyed and a summary of the key areas addressed in that section of the standards.

In this section of the report, a recommendation identifies any standard for which CARF determined that the organization did not meet the minimum requirements to demonstrate full conformance. All recommendations must be addressed in a QIP submitted to CARF.

In addition, consultation may be provided for areas of or specific standards where the surveyor(s) documented suggestions that the organization may consider to improve its business or service delivery practices. Note that consultation may be offered for areas of specific standards that do not have any recommendations. Such consultation does not indicate nonconformance to the standards; it is intended to offer ideas that the organization might find helpful in its ongoing quality improvement efforts. The organization is not required to address consultation.

When CARF surveyors visit an organization, their role is that of independent peer reviewers, and their goal is not only to gather and assess information to determine conformance to the standards, but also to engage in relevant and meaningful consultative dialogue. Not all consultation or suggestions discussed during the survey are noted in this report. The organization is encouraged to review any notes made during the survey and consider the consultation or suggestions that were discussed.

During the process of preparing for a CARF accreditation survey, an organization may conduct a detailed self-assessment and engage in deliberations and discussions within the organization as well as with external stakeholders as it considers ways to implement and use the standards to guide its quality improvement efforts. The organization is encouraged to review these discussions and deliberations as it considers ways to implement innovative changes and further advance its business and service delivery practices.

## **Section 1. ASPIRE to Excellence®**

### **1.A. Leadership**

#### **Description**

CARF-accredited organizations identify leadership that embraces the values of accountability and responsibility to the individual organization's stated mission. The leadership demonstrates corporate social responsibility.

#### **Key Areas Addressed**

- Leadership structure and responsibilities
- Person-centered philosophy
- Organizational guidance
- Leadership accessibility
- Cultural competency and diversity
- Corporate responsibility
- Organizational fundraising, if applicable

#### **Recommendations**

##### **1.A.6.a.(6)(e)**

It is recommended that the written ethical codes of conduct be expanded to include, regarding service delivery, witnessing of legal documents.

##### **1.A.7.b.**

##### **1.A.7.c.(2)(a)**

##### **1.A.7.c.(2)(b)**

##### **1.A.7.c.(2)(c)**

##### **1.A.7.d.(1)**

##### **1.A.7.d.(2)**

##### **1.A.7.e.**

As an organization in the United States receiving federal funding, FACTS should expand its demonstration of corporate compliance through implementation of written procedures that address exclusion of individuals and entities from federally funded healthcare programs. Although the organization has a policy that identifies the compliance officer, it is recommended that the compliance officer monitor matters pertaining to corporate compliance, conduct corporate compliance risk assessments, and report on matters pertaining to corporate compliance. The organization should also demonstrate training of personnel on corporate compliance, including the role of the compliance officer and the organization's procedures for allegations of fraud, waste, abuse, and other wrongdoing, and internal auditing activities.

## 1.C. Strategic Planning

### Description

CARF-accredited organizations establish a foundation for success through strategic planning focused on taking advantage of strengths and opportunities and addressing weaknesses and threats.

### Key Areas Addressed

- Environmental considerations
- Strategic plan development, implementation, and periodic review

### Recommendations

There are no recommendations in this area.

## 1.D. Input from Persons Served and Other Stakeholders

### Description

CARF-accredited organizations continually focus on the expectations of the persons served and other stakeholders. The standards in this subsection direct the organization's focus to soliciting, collecting, analyzing, and using input from all stakeholders to create services that meet or exceed the expectations of the persons served, the community, and other stakeholders.

### Key Areas Addressed

- Collection of input
- Integration of input into business practices and planning

### Recommendations

There are no recommendations in this area.

### Consultation

- FACTS obtains feedback from each consumer at his/her exit from services. The organization might find it helpful to provide an anonymous avenue for discharged consumers to provide feedback to the organization.

## 1.E. Legal Requirements

### Description

CARF-accredited organizations comply with all legal and regulatory requirements.

### Key Areas Addressed

- Compliance with obligations
- Response to legal action
- Confidentiality and security of records

### Recommendations

There are no recommendations in this area.

## 1.F. Financial Planning and Management

### Description

CARF-accredited organizations strive to be financially responsible and solvent, conducting fiscal management in a manner that supports their mission, values, and performance objectives. Fiscal practices adhere to established accounting principles and business practices. Fiscal management covers daily operational cost management and incorporates plans for long-term solvency.

### Key Areas Addressed

- Budgets
- Review of financial results and relevant factors
- Fiscal policies and procedures
- Reviews of bills for services and fee structures, if applicable
- Safeguarding funds of persons served, if applicable
- Review/audit of financial statements

### Recommendations

#### 1.F.10.a.

Although a CPA provides a quarterly review and issues a summary letter, FACTS is urged to provide documented evidence of an annual review or audit of the financial statements of the organization conducted by an independent accountant authorized by the appropriate authority.

## 1.G. Risk Management

### Description

CARF-accredited organizations engage in a coordinated set of activities designed to control threats to their people, property, income, goodwill, and ability to accomplish goals.

### Key Areas Addressed

- Risk management plan implementation and periodic review
- Adequate insurance coverage
- Media relations and social media procedures
- Reviews of contract services

### Recommendations

There are no recommendations in this area.

## 1.H. Health and Safety

### Description

CARF-accredited organizations maintain healthy, safe, and clean environments that support quality services and minimize risk of harm to persons served, personnel, and other stakeholders.

## Key Areas Addressed

- Competency-based training on safety procedures and practices
- Emergency procedures
- Access to first aid and emergency information
- Critical incidents
- Infection control
- Health and safety inspections

## Recommendations

1.H.4.a.(5)

1.H.4.a.(6)

1.H.4.b.(2)

1.H.4.b.(3)

1.H.4.b.(5)

1.H.4.b.(6)

It is recommended that personnel receive documented competency-based training at orientation in the identification and reporting of critical incidents. They should also receive training at least annually in the identification of unsafe environmental factors, emergency procedures, and the identification and reporting of critical incidents.

1.H.9.f.(9)

1.H.9.f.(10)

1.H.9.f.(13)

1.H.9.f.(14)

FACTS is urged to expand its written procedures regarding critical incidents to include wandering, elopement, unauthorized use and possession of legal or illegal substances, and abuse.

1.H.11.b.(1)(a)

1.H.11.b.(1)(b)

1.H.11.b.(2)

The organization should implement procedures that include training regarding infections and communicable diseases, and appropriate use of standard or universal precautions.

## 1.I. Workforce Development and Management

### Description

CARF-accredited organizations demonstrate that they value their human resources and focus on aligning and linking human resources processes, procedures, and initiatives with the strategic objectives of the organization. Organizational effectiveness depends on the organization's ability to develop and manage the knowledge, skills, abilities, and behavioral expectations of its workforce. The organization describes its workforce, which is often composed of a diverse blend of human resources. Effective workforce development and management promote engagement and organizational sustainability and foster an environment that promotes the provision of services that center on enhancing the lives of persons served.

### Key Areas Addressed

- Composition of workforce
- Ongoing workforce planning
- Verification of background/credentials/fitness for duty

- Workforce engagement and development
- Performance appraisals
- Succession planning

### **Recommendations**

There are no recommendations in this area.

## **1.J. Technology**

### **Description**

CARF-accredited organizations plan for the use of technology to support and advance effective and efficient service and business practices.

### **Key Areas Addressed**

- Ongoing assessment of technology and data use
- Technology and system plan implementation and periodic review
- Technology policies and procedures
- Written procedures for the use of information and communication technologies (ICT) in service delivery, if applicable
- ICT instruction and training, if applicable
- Access to ICT information and assistance, if applicable
- Maintenance of ICT equipment, if applicable
- Emergency procedures that address unique aspects of service delivery via ICT, if applicable

### **Recommendations**

There are no recommendations in this area.

## **1.K. Rights of Persons Served**

### **Description**

CARF-accredited organizations protect and promote the rights of all persons served. This commitment guides the delivery of services and ongoing interactions with the persons served.

### **Key Areas Addressed**

- Policies that promote rights of persons served
- Communication of rights to persons served
- Formal complaints by persons served

### **Recommendations**

#### **1.K.3.b.(1)**

FACTS recently updated its policy and written procedure by which consumers may formally complain to the organization to specify levels of review and associated timeframes. It is recommended that the organization ensure that complaint procedures and, if applicable, forms are readily available to the consumers. This could be accomplished by adding this information to the consumer handbook.

## 1.L. Accessibility

### Description

CARF-accredited organizations promote accessibility and the removal of barriers for the persons served and other stakeholders.

### Key Areas Addressed

- Assessment of accessibility needs and identification of barriers
- Accessibility plan implementation and periodic review
- Requests for reasonable accommodations

### Recommendations

There are no recommendations in this area.

## 1.M. Performance Measurement and Management

### Description

CARF-accredited organizations are committed to continually improving their organizations and service delivery to the persons served. Data are collected and analyzed, and information is used to manage and improve service delivery.

### Key Areas Addressed

- Data collection
- Establishment and measurement of performance indicators

### Recommendations

There are no recommendations in this area.

## 1.N. Performance Improvement

### Description

The dynamic nature of continuous improvement in a CARF-accredited organization sets it apart from other organizations providing similar services. CARF-accredited organizations share and provide the persons served and other interested stakeholders with ongoing information about their actual performance as a business entity and their ability to achieve optimal outcomes for the persons served through their programs and services.

### Key Areas Addressed

- Analysis of performance indicators in relation to performance targets
- Use of performance analysis for quality improvement and organizational decision making
- Communication of performance information

### Recommendations

There are no recommendations in this area.

## Section 2. Quality Individualized Services and Supports

### Description

For an organization to achieve quality services, the persons served are active participants in the planning, implementation, and ongoing review and revision of the services offered. The organization's commitment to quality and the involvement of the persons served spans the entire time that the persons served are involved with services. The service planning process is individualized, establishing goals and measurable objectives that incorporate the unique strengths, abilities, needs, and preferences of the persons served. Services are responsive to the expectations of persons served and their desired outcomes from services, and are relevant to their maximum participation in the environments of their choice.

### 2.A. Program/Service Structure

#### Description

A fundamental responsibility of the organization is to provide a comprehensive program structure. The staffing is designed to maximize opportunities for the persons served to obtain and participate in the services provided.

#### Key Areas Addressed

- Services are person-centered and individualized
- Persons are given information about the organization's purposes and ability to address desired outcomes
- Documented scope of services shared with stakeholders
- Service delivery based on accepted field practices
- Communication for effective service delivery
- Entrance/exit/transition criteria

#### Recommendations

There are no recommendations in this area.

#### Consultation

- FACTS provides a printed handbook that clearly outlines the information needed by consumers. The handbook is verbally reviewed with each consumer as part of orientation. It is also available in Spanish, large print, audio, and video formats. It is suggested that the handbook be adjusted to the sixth grade reading level and that a pictorial-format handbook be developed.
- The program's entry criteria include referral from the California Department of Rehabilitation. It is suggested that the criteria be expanded to include all applicable referral sources.

### 2.D. Employment Services Principle Standards

#### Description

An organization seeking CARF accreditation in the area of employment services provides individualized services and supports to achieve identified employment outcomes. The array of services and supports may include:

- Identification of employment opportunities and resources in the local job market.
- Development of viable work skills that match workforce needs within the geographic area.
- Development of realistic employment goals.

- Establishment of service plans to achieve employment outcomes.
- Identification of resources and supports to achieve and maintain employment.
- Coordination of and referral to employment-related services and supports.

The organization maintains its strategic positioning in the employment sector of the community by designing and continually improving its services based on input from the persons served and from employers in the local job market, and managing results of the organization's outcomes management system. The provision of quality employment services requires a continuous focus on the persons served and the personnel needs of employers in the organization's local job market.

Some examples of the quality results desired by the different stakeholders of these services and supports include:

- Individualized, appropriate accommodations.
- A flexible, interactive process that involves the person.
- Increased independence.
- Increased employment options.
- Timely services and reports.
- Persons served obtain and maintain employment consistent with their preferences, strengths, and needs.
- Person served obtains a job at minimum wage or higher and maintains appropriate benefits.
- Person served maintains the job.

#### **Key Areas Addressed**

- Goals of the persons served
- Community resources available
- Personnel needs of local employers
- Economic trends in the local employment sector

#### **Recommendations**

There are no recommendations in this area.

#### **Consultation**

- It is suggested that FACTS add a dedicated section to the individual employment plan format for documenting the specific responsibilities of each member of the service delivery team.

## **Section 3. Employment Services**

### **Description**

An organization seeking CARF accreditation in the area of employment services assists the persons served through an individualized person-centered process to obtain access to the services, supports, and resources of their choice to achieve their desired outcomes. This may be accomplished by direct service provision, linkages to existing generic opportunities and natural supports in the community, or any combination of these. The persons served are included in their communities to the degree they desire.

The organization provides the persons served with information so that they may make informed choices and decisions. Although we use the phrase person served, this may also include family served, as appropriate to the service and the individual.

The services and supports are arranged and changed as necessary to meet the identified desires of the persons served. Service designs address identified individual, family, socioeconomic, and cultural preferences.

Depending on the program's scope of services, expected results from these services/supports may include:

- Increased inclusion in community activities.
- Increased self-direction, self-determination, and self-reliance
- Self-esteem.
- Community citizenship.
- Increased independence.
- Meaningful activities.
- Increased employment options.
- Employment obtained and maintained.
- Competitive employment.
- Employment at or above minimum wage.
- Economic self-sufficiency.
- Employment with benefits.
- Career advancement.

### **3.B. Comprehensive Vocational Evaluation Services (CVE)**

#### **Description**

Comprehensive vocational evaluation services provide an individualized, timely, and systematic process by which a person seeking employment, in partnership with an evaluator, learns to identify viable vocational options and develop employment goals and objectives. A vocational evaluator or vocational specialist provides or supervises the services.

An accredited comprehensive vocational evaluation service is capable of examining a wide range of employment alternatives. The following techniques are used, as is appropriate to the person being assessed, to provide comprehensive vocational evaluation services:

- Pre-evaluation assessment of assistive technology needs.
- Assessment of functional/occupational performance in real or simulated environments.
- Work samples.
- Employment exploration model.
- Psychometric testing.
- Preference and interest inventories.
- Personality testing.
- Extensive personal interviews.
- Other appropriate evaluation tests, depending on the individual.
- Analysis of prior work and/or volunteer experience and transferable skills.

Some examples of the quality results desired by the different stakeholders of these services include:

- Realistic job opportunities are explored and identified for individuals.
- Employment barriers are identified and ways to overcome these are suggested.
- Assistive technology or other accommodations needed are identified.
- The evaluation is completed within the authorization period.
- The person served understands the results.
- The cost per evaluation is acceptable.
- Interests of the persons served are thoroughly explored.
- Evaluation reports lead to job goals.
- Transferable skills are identified.

### **Key Areas Addressed**

- Various exploratory techniques used by qualified evaluators
- Information obtained is shared
- Screenings are based on and answer referral questions
- Vocational options identified
- Employment goals
- Personnel meet applicable qualifications for the work

### **Recommendations**

There are no recommendations in this area.

# Program(s)/Service(s) by Location

## **Foster Assessment Center & Testing Service, Inc.**

516 Pennsfield Place, Suite 108  
Thousand Oaks, CA 91360

Comprehensive Vocational Evaluation Services

## **Foster Assessment Center & Testing Service, Inc. - Anaheim**

50 South Anaheim Boulevard, Suite 251  
Anaheim, CA 92805

Comprehensive Vocational Evaluation Services

## **Foster Assessment Center & Testing Service, Inc. - Bakersfield**

5121 Stockdale Highway, Suite 250  
Bakersfield, CA 93309

Comprehensive Vocational Evaluation Services

## **Foster Assessment Center & Testing Service, Inc. - Fresno**

2350 West Shaw Avenue, Suite 118  
Fresno, CA 93711

Comprehensive Vocational Evaluation Services

## **Foster Assessment Center & Testing Service, Inc. - Long Beach**

3447 Atlantic Avenue, Suite 215  
Long Beach, CA 90807

Comprehensive Vocational Evaluation Services

## **Foster Assessment Center & Testing Service, Inc. - Los Angeles**

1541 Wilshire Boulevard, Suite 100  
Los Angeles, CA 90017

Comprehensive Vocational Evaluation Services

## **Foster Assessment Center & Testing Service, Inc. - Northridge**

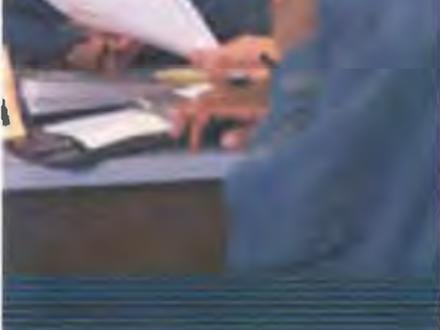
16921 Parthenia Street, Suite 205  
Northridge, CA 91343

Comprehensive Vocational Evaluation Services

## **Foster Assessment Center & Testing Service, Inc. - Palmdale**

1603 East Palmdale Boulevard, Suite E  
Palmdale, CA 93550

Comprehensive Vocational Evaluation Services



**F  
A  
C  
T  
S**

**FRESNO COUNTY CalWORKs**  
**LIMITED ENGLISH**  
**PROFICIENCY ASSESSMENTS**  
*and*  
**LEARNING DISABILITY**  
**EVALUATIONS**

*Conducted by*  
**Foster Assessment Center & Testing**  
**Service, Inc. (FACTS)**

July 1, 2020 through June 30, 2021

***PARTICIPANT SATISFACTION***  
***FEEDBACK SUMMARY***

Foster Assessment Center & Testing Service, Inc.  
2350 West Shaw Avenue, Suite 118  
Fresno, CA 93711  
Phone (559) 721-7488  
Fax (559) 721-7589  
[Fresno@FosterAssessment.com](mailto:Fresno@FosterAssessment.com)

FACTS Administrative Office  
516 Pennsfield Pl, Suite #108  
Thousand Oaks, CA 91360  
(805) 497-1685 Phone  
(805) 497-2525 Fax

[www.FosterAssessment.com](http://www.FosterAssessment.com)



# CalWORKs PARTICIPANT SATISFACTION FEEDBACK SUMMARY

*for*

## FRESNO COUNTY DEPARTMENT OF SOCIAL SERVICES

*Introduction: Foster Assessment Center & Testing Service, Inc. (FACTS) provides Limited English Proficiency (LEP) assessments and Learning Disability Evaluations (LDE) to Fresno County Department of Social Services CalWORKs participants. FACTS is providing this Participant Satisfaction Feedback Summary in order to report the collection of data regarding participants' satisfaction with Limited English Proficiency (LEP) assessments and Learning Disability (LD) evaluation services received. The purpose of this summary report is to continually improve the services provided to participants; to gather the individual responses by participants served; and to determine what FACTS must do to respond to participant trends on an organizational planning and management level.*

*CalWORKs Social Service **district offices served by FACTS** for Fresno County Department of Social Services and covered in this survey include Selma and Reedley.*

*FACTS provides CalWORKs assessments and learning disability (LD) evaluations to six other Southern California counties and has found that analysis of these feedback forms completed by participants is useful in developing strategies to continuously improve our services.*

*Collection of data regarding participant's satisfaction with the services is achieved through the Participant Satisfaction Feedback Form. Upon completion of services, the participant is requested to fill out the feedback questionnaire form and offer feedback on the services that he/she received. The feedback questionnaire form offers a list of questions to be answered by the participant.*

*It is important to note that referrals were dramatically influenced due to the negative effects of Covid-19, at home isolation, and many participants choosing to forego their scheduled service.*

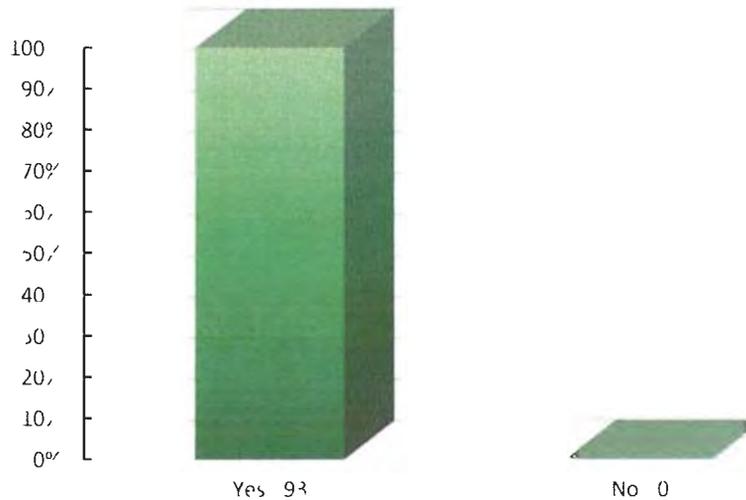
*This summary report reviews each question that is included on the Participant Satisfaction Feedback Form. **FACTS received a total of 93 Participant Satisfaction Feedback Forms from Fresno County CalWORKs participants for July 1, 2020 to June 30, 2021.** Graphs depict participant responses for nine out of 11 questions on the feedback form. The other two questions include quoted responses made by participants. The raw data (number of responses received from participants) is given next to the responses in each graph. Each bar graph offers a quick view of participant satisfaction with regards to each question asked.*

*It is the goal of Foster Assessment Center and Testing Service, Inc. to receive a minimum of 98% positive responses to all questions asked. This year, we received an average positive response of 100% to all questions asked.*

**Total number of completed forms received and reviewed: 93**

### QUESTION 1

Was the limited English proficiency assessment or LD evaluation a valuable experience for you?



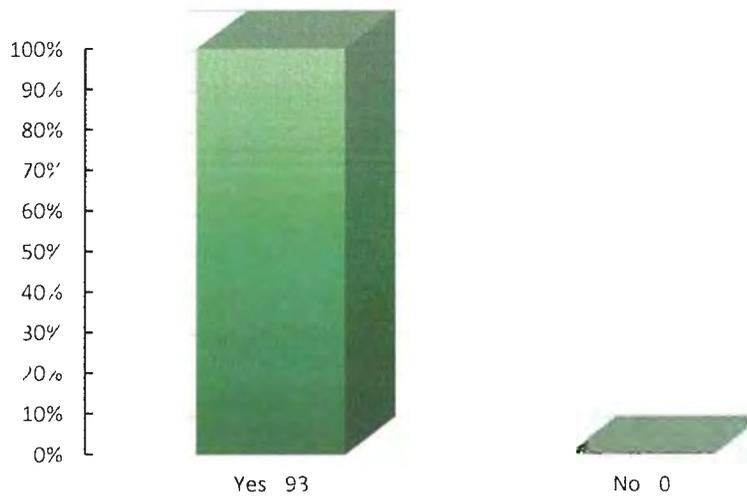
**Comments:** When asked if the Limited English Proficiency (LEP) assessment or Learning Disability Evaluation (LDE) was a valuable experience, **100% of participants responded positively.**

The following are positive comments from participants regarding their experience during the limited English proficiency assessment or LD evaluation:

- “The service should stay the same. It was a very good experience.”
- “Everything was just right.”
- “Your service needs no improvement. It is very helpful and the staff were great.”
- “Everything went really well. I appreciate the way I was treated and the time spent with me.”
- “I had a great experience. Great service in general. Thank you for making me feel comfortable.”

## QUESTION 2

Was the assessment staff courteous and professional?



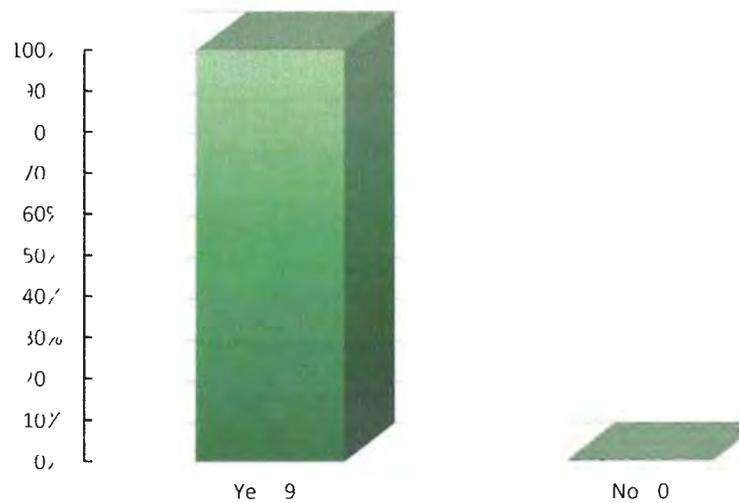
**Comments:** 100% of participants reported that they were treated in a courteous and professional manner by the evaluation staff.

The following responses, which relate to the professionalism of the staff, were noted:

- “I wouldn’t change anything about the evaluation. The evaluator was very helpful and gave me lots of encouragement.”
- “Everything was really good. The evaluator was very courteous and took her time with me.”
- “The evaluator that I worked with was very nice.”
- “The evaluator was very nice and made me less anxious.”

### QUESTION 3

Did you understand the purpose of the LEP assessment or LD evaluation?



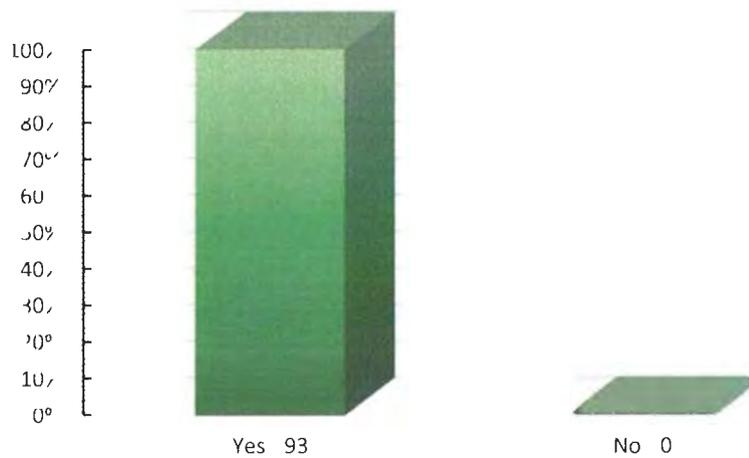
**Comments:** 100% of participants indicated that the purpose of the Limited English Proficiency (LEP) assessment or Learning Disability Evaluation (LDE) was clear and understandable.

When asked if the purpose of the assessment/LD evaluation was clear and understandable, participants reported the following:

- “Everything was very orderly and the information provided to me was clear and precise. Thank you.”
- “Thank you to the staff that helped me and explained everything to me. They were all very courteous.”

#### QUESTION 4

Was the LEP assessment/LD evaluation staff able to answer any questions that you may have had about any specific tests or procedures?



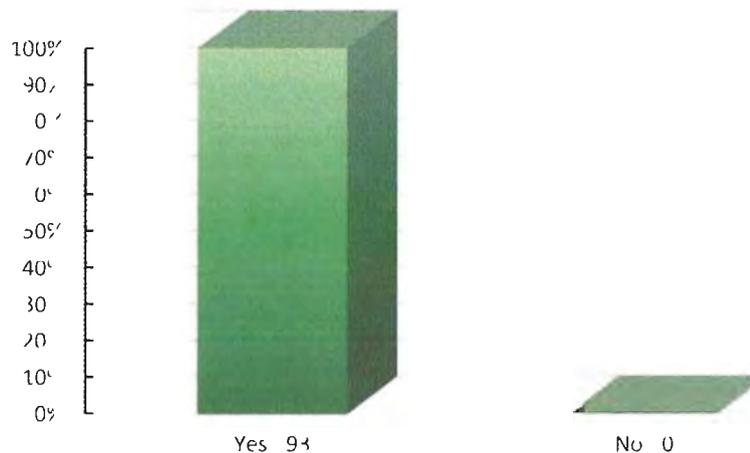
**Comments:** 100% of participants reported that the LEP assessment or LD evaluation staff answered all of their questions during the course of their assessment or evaluation.

The following are **positive comments** from participants regarding the **assessor's / LD evaluator's ability to effectively answer his / her questions:**

- "Everyone was very nice and helpful, thank you."
- "I did not expect the evaluator to take their time with me so I appreciate that she did."
- "They did an awesome job!"

## QUESTION 5

Did the information provided to you by your assessor or LD evaluator help you in making an employment decision?



**Comments:** Results reflected 100% of participants either believed that their participation in the Limited English Proficiency (LEP) assessment or Learning Disability Evaluation (LDE) assisted them with making an employment decision, that they were undecided or the question did not apply to them. It is important to note that some LDE referrals do not include determination of an employment goal.

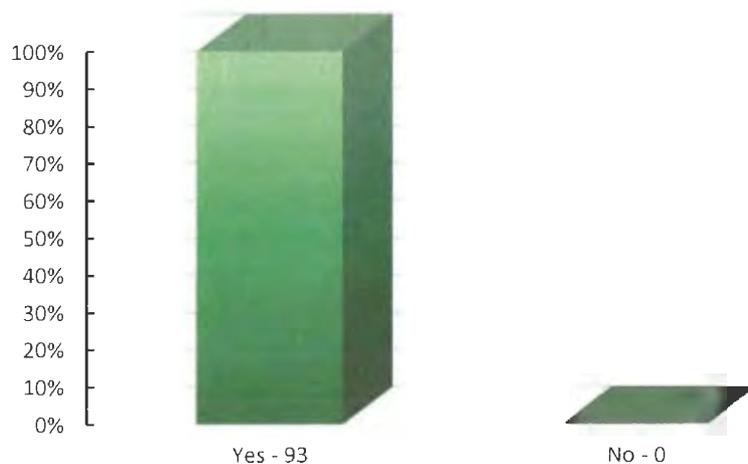
### Question 6: What would you change about the Limited English Proficiency (LEP) assessment or Learning Disability Evaluation (LDE)?

**Comments:** When asked this question, the majority of participants (98%) responded that they would not change anything about their Limited English Proficiency (LEP) assessment or Learning Disability Evaluation (LDE) experience or did not answer this question.

However, a small number of participants (2%) recommended constructive changes to improve FACTS' assessment/LD evaluation services. Please refer to Question 11 on page 10 [How can we improve our services?] to peruse these comments.

### QUESTION 7

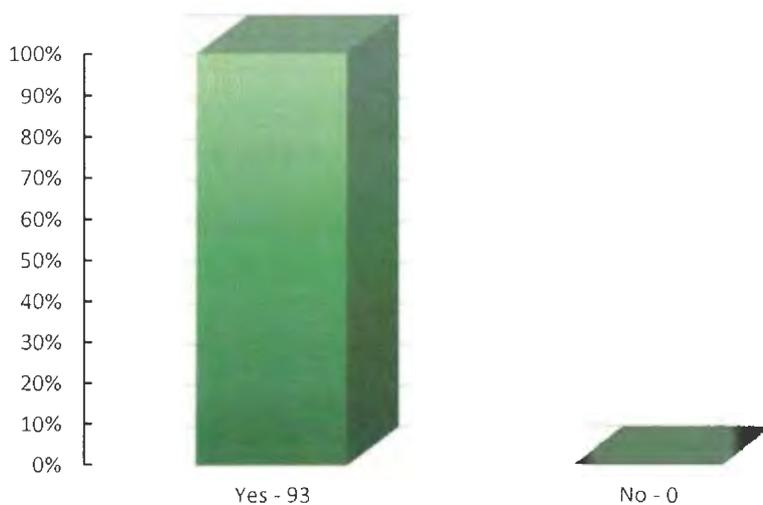
Do you feel your rights were respected during the LEP assessment or LD evaluation?



**Comments:** 100% of participants reported that their rights were respected during their Limited English Proficiency (LEP) assessment or Learning Disability Evaluation (LDE).

### QUESTION 8

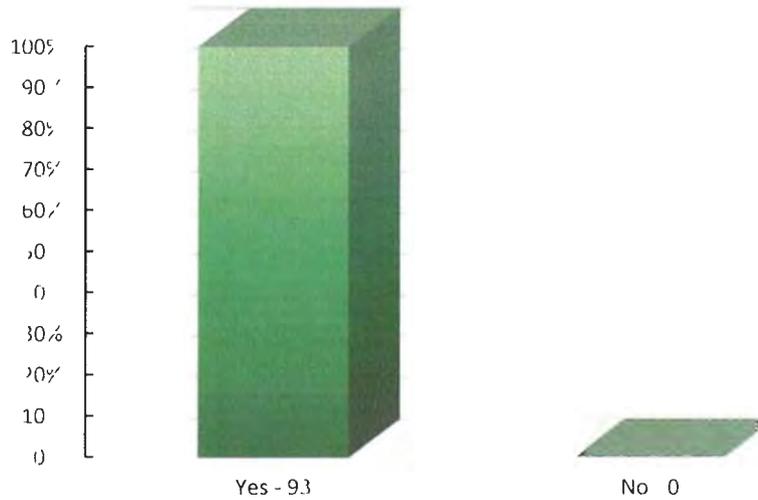
Do you feel the assessor/LD evaluator fully considered your interests and desires?



**Comments:** 100% of participants indicated that the assessor/LD evaluator fully considered their interests and desires during the Limited English Proficiency (LEP) assessment or Learning Disability Evaluation (LDE), or indicated that this question did not apply to them. No participant indicated their interests were not considered.

## QUESTION 9

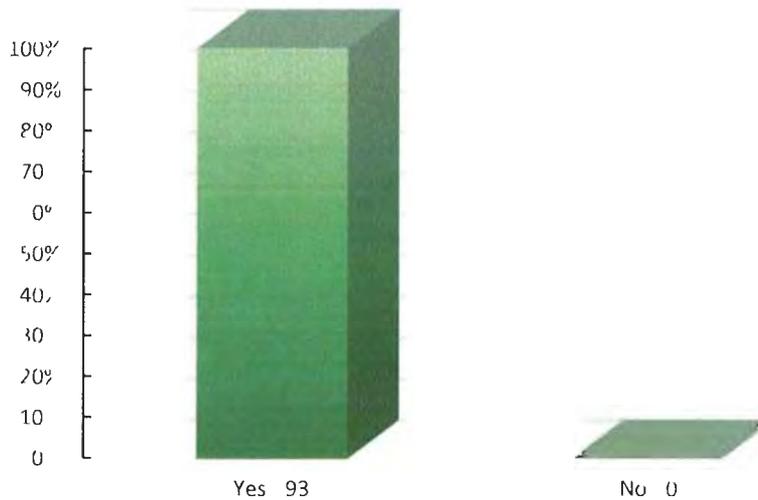
Were you scheduled to participate in the LEP assessment or LD evaluation in a timely manner?



**Comments:** 100% of participants reported that they were scheduled to participate in the Limited English Proficiency (LEP) assessment or Learning Disability Evaluation (LDE) at FACTS in a timely manner.

## QUESTION 10

Were you satisfied with the services provided to you?



**Comments:** 100% of participants felt *very satisfied* with the results of their Limited English Proficiency (LEP) assessment or Learning Disability Evaluation (LDE). Significantly, **none of the participants reported dissatisfaction** with the assessment or evaluation services.

### **Question 10: Were you satisfied with the services provided to you? (Continued)**

The following are **positive comments** from participants, which **reflected satisfaction** with the Limited English Proficiency assessment or LD evaluation services:

- “Everything was good.”
- “I wouldn’t change anything. This service is very good.”
- “I liked everything about the evaluation.”

### **Question 11: How can we improve our services?**

**Comments:** When asked this question, **the majority of participants remarked with positive comments** or did not answer this question. Following are comments received from two participants (2%) which **suggested improvement** to FACTS’ services:

- “The math test was different.”
- “Not share my results [with me].”

### **Additional Notes Regarding Participant Feedback Responses**

Although negative feedback made up less than 2% of all responses obtained in this survey, the information provided by any participant is valuable. Each negative feedback form is reviewed by the evaluator, and the evaluator provides responses to that particular feedback. Therefore, the Evaluator Response to Participant Satisfaction Feedback Form is used by evaluators with participants to address negative feedback on the Participant Satisfaction Feedback Form.

During this survey period, one participant appeared to struggle with one of the math tests, indicating it was “different”:

It is important to note that FACTS has numerous types of math indices/tests, and the evaluator or assessor selects tests which appears to provide the most information regarding that particular participant. For example, tests range from “easy” (commencing at less than first grade level) to “advanced” (college level). Additionally, if an individual appears to struggle with some portion of math (fractions, decimals, etc.) that information is also selectively assessed. Since math is oftentimes a very difficult subject for individuals, tests are administered in a sensitive and careful way, allowing the participant to privately demonstrate their skills in the best manner possible, via both timed and/or untimed testing.

Another participant indicated a preference that test results not be reviewed with them.

It is understandable that some individuals are nervous about reviewing how they performed on tests, and would rather not discuss those results. If after completing the assessment or evaluation, an individual advises the staff that they would like to remain uninformed regarding their results, that wish will be honored, as some individuals struggle with processing that information, and would rather discuss such with the referring Job Specialist. However, FACTS staff will review all results with every participant (if allowed) in order to fully explain both their strengths, barriers, and potential accommodations for assistance in removing or remediating the barriers. Generally, a conversation regarding skills, test results and strengths is an important conversation to be held, as it strongly impacts a selection of employment goals and/or formal training recommendations.

Also, many individuals completing a Learning Disability Evaluation (LDE) have struggled in school, oftentimes failing tests, commencing as early as their elementary school years. It is important these individuals understand that a learning disability is something that accompanies an average to above average intelligence quotient (IQ) and does not label them as unintelligent – quite the opposite. For those who are deemed to meet the criteria of learning disabled, one of the most important conversations to have with the evaluator, in our opinion, is the definition of a learning disability, how it is “not your fault”, how individuals can accommodate deficits in their learning via use of calculators, extra time, books on tape, use of a notetaker, etc., and how to view their skills in a much more positive light. These are difficult conversations, however, most often the participant expresses their intense gratitude and relief after holding just that conversation. After reviewing test scores with most participants found to be learning disabled, FACTS evaluators regularly hear such comments as:

- “I always knew I learned differently, but never knew what to do about it.”
- “You are telling me I am smart (high IQ) and I always thought I was stupid.”
- “No one ever discussed my struggles with me. They just put me in the slow class and I always thought I was just slow. I never knew any of this until now.”
- “Thank you so much for explaining this. I feel so much better about myself now that I know what accommodations I need to use.”
- “I should have completed these tests years ago. Thank you for helping me understand myself better.”

#### **- Recommendations for Improvement & Continuation of Good Practices -**

The Participant Satisfaction Feedback Results Summary reflected positive and supportive feedback from participants. However, FACTS strives to continually improve the services available to both participants and Job Specialists. Therefore, **the following are recommendations for continued good practices and service improvements:**

- One participant indicated difficulty with a math test. Evaluators should always be sensitive to an individual’s feelings regarding taking tests, allowing them to demonstrate their skills in the most effective, yet positive, way possible. FACTS maintains dozens of various types of math tests/indices and the selection of which test for each person is the topic of regular evaluator training. If an individual ever indicates they are uncomfortable taking a particular test, other options should be provided, and the participant encouraged to do their best,

assuring each person that they cannot “fail” the assessment or evaluation – that it is merely an attempt to determine their current skill level so that a more appropriate plan can be made to assist them in their journey towards training, employment and ultimately self-sufficiency. No participant is ever mandated to take any particular test. In these instances, the assessor or evaluator will notify the referring Job Specialist of all conversations held with the participant in order to best assist where needed, and to ascertain they are aware of that individual’s concerns. It is important to note that if after speaking with the Job Specialist, the participant would like to return to take that particular test, FACTS will accommodate that person, at no additional charge, for up to one year after completion of their assessment or evaluation. FACTS should be seen as a long term consultant on every case, as we see ourselves as partners with the County of Fresno, with the goal of assisting each and every individual reach their full employment potential.

## *CONCLUSIONS*

The use and sharing of the feedback results summary with participants, referral sources, and FACTS’ staff is a critical aspect of continuously improving the comprehensive Limited English Proficiency and Learning Disability Evaluation services that FACTS provides. The use of this information is vital in short and long range planning, fiscal management, and quality service improvement.

FACTS will incorporate these Participant Satisfaction Feedback Form results into upcoming quarterly staff training sessions. Investigation of common issues, concerns, brainstorming of solutions, and assessment of outcomes and results will occur at the quarterly staff training sessions. Feedback from referral sources is also welcome. Any feedback concerns and issues brought forth from referral sources will also be discussed in upcoming quarterly in-house staff training sessions.

Any questions or concerns regarding this study should be directed to Andrea Foster, Chief Executive Officer, at (805) 497-1685 or visit our website at [www.FosterAssessment.com](http://www.FosterAssessment.com)

***COUNTY of FRESNO***  
***Department of Social Services***  
**CalWORKs Job Specialists**

***LIMITED ENGLISH PROFICIENCY***  
***ASSESSMENTS & LEARNING DISABILITY***  
***EVALUATIONS***

**SATISFACTION FEEDBACK**  
**SUMMARY**

**January 2021 through December 2021**

**FOSTER ASSESSMENT CENTER &  
TESTING SERVICE, INC. (FACTS)**



**OUTCOMES MANAGEMENT REPORT**

## CalWORKs JOB SPECIALIST SATISFACTION FEEDBACK SUMMARY

*for*

### FRESNO COUNTY DEPARTMENT OF SOCIAL SERVICES

**Introduction:** Foster Assessment Center & Testing Service, Inc. (FACTS), a Specialized Assessment provider of Limited English Proficiency (LEP) Assessments and Learning Disability Evaluations (LDE), is pleased to provide this County of Fresno DSS CalWORKs Job Specialist Satisfaction Feedback Summary in order to report the collection of data regarding Job Specialists' satisfaction with assessment and evaluation services provided to participants. The purpose of this system is to continually improve the services provided to both Job Specialists and to participants, and to gather the individual responses from Job Specialists who referred participants to FACTS. The results of this study will be used by FACTS in future planning and decision making and in improving assessment and evaluation services made available to participants through Job Specialists.

Collection of data regarding Job Specialists' satisfaction with the Limited English Proficiency (LEP) Assessment/Learning Disability Evaluation services offered to their participants is achieved through the DSS Job Specialist Satisfaction Feedback form. The Job Specialist has the opportunity to complete the feedback questionnaire form and offer feedback on the services that their participants received at FACTS. The feedback questionnaire form offers a list of questions to be answered by the Job Specialist. The Job Specialist is provided this form along with the participant's final assessment or evaluation report.

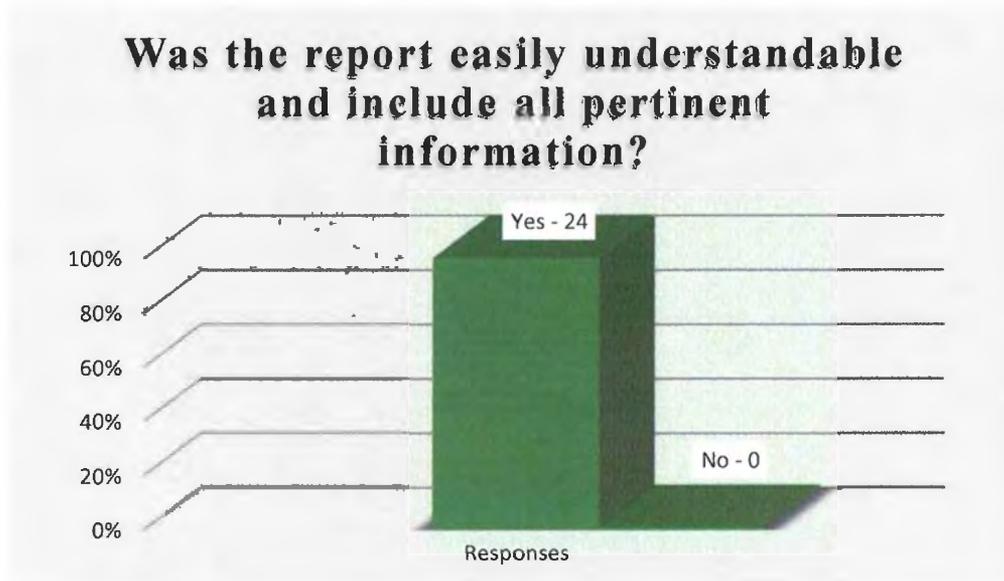
It is important to note that referrals were dramatically influenced due to the negative effects of COVID-19, at-home isolation and many participants choosing to forgo their scheduled services.

This summary report reviews each question that is included on the Job Specialist Satisfaction Feedback form. **FACTS received a total of 24 Job Specialist Satisfaction Feedback forms** from the County of Fresno DSS CalWORKs Job Specialists from **January 1, 2021 to December 31, 2021** and incorporated all feedback into this report. No negative feedback form is selectively removed. Graphs depict Job Specialists' responses for each question on the feedback form. Further information is provided that reviews additional comments offered by Job Specialists. Next to the responses in each graph, the raw data (number of responses received by Job Specialists) is given. Each bar graph offers a quick view of Job Specialist satisfaction with regards to each question asked.

It is the goal of Foster Assessment Center & Testing Service, Inc. to receive a minimum of 98% positive responses to all questions asked. This year we received an **average positive response of 99% to all questions asked**, with no less than an 96% positive response to any one feedback question.

**Total number of completed forms received and reviewed: 24**

**Question 1**

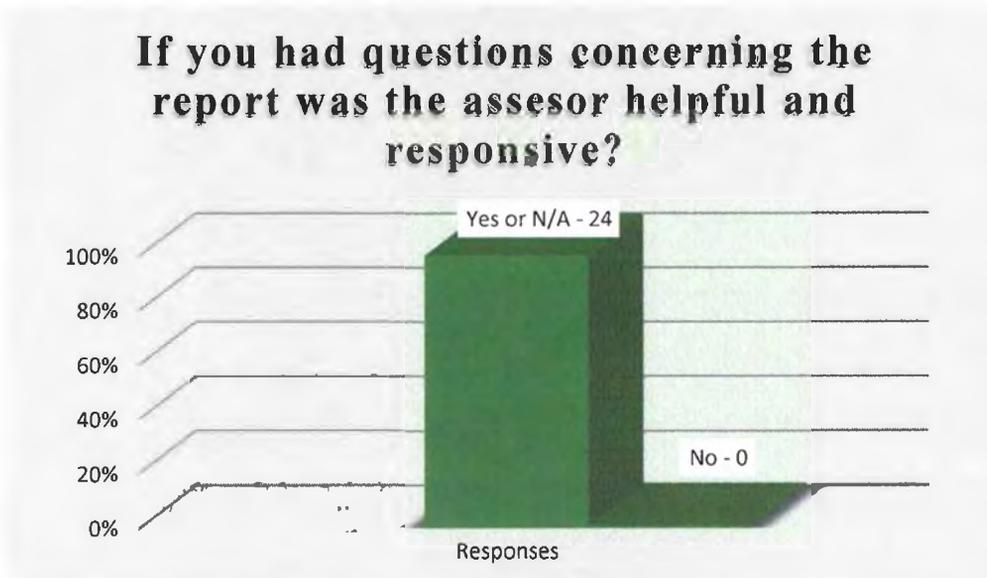


**Comments:** 100% of Job Specialists reported that the evaluation or assessment report was easily understandable and included all pertinent information expected. Note: Assessment and evaluation reports provided to Job Specialists are very specific to the individual participant, and specific referral questions posed at the time of the referral should always be addressed.

The following are **positive comments** received from Job Specialists, **regarding the content of participants' reports:**

- "Always appreciate the background information on the clients."
- "I always enjoy the detail of the assessment."

## Question 2



**Comments:** 100% of Fresno County Job Specialists stated that the assessor/LD evaluator was responsive and helpful in responding to questions they had concerning the assessment or the evaluation. Note that some Job Specialists indicated this question was not applicable to them as they did not have any questions for the assessor/LD evaluator.

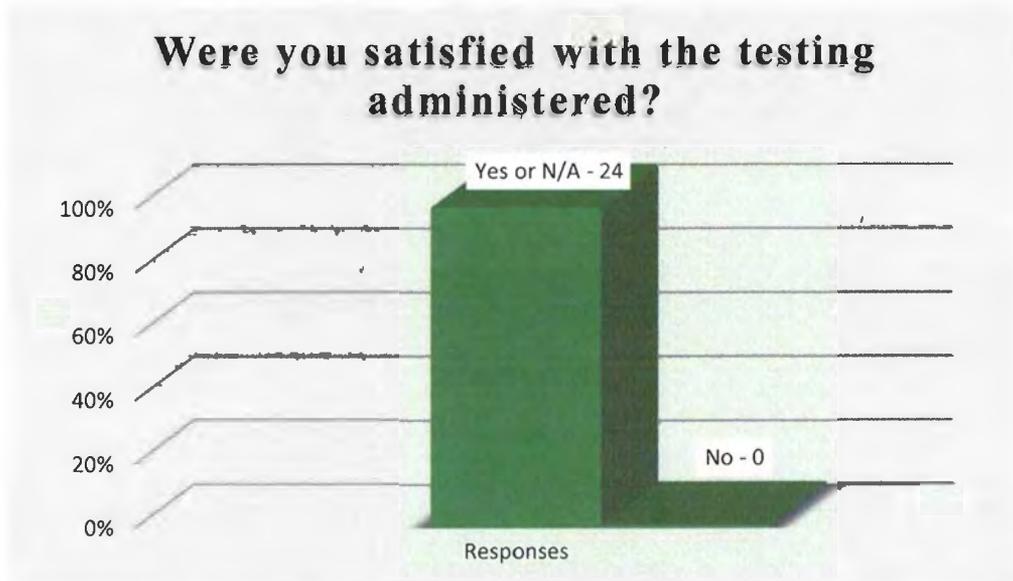
Most Job Specialists indicated that questions were fully answered and the assessor provided answers to questions within the report or when phoned in. Most Job Specialists stated:

- "I had no questions regarding the report received."

A suggestion from a Job Specialist for improving the participants' reports included:

- "I just have one question. After reviewing the assessment, I found something to be conflicting. On Section 3, the Job Readiness portion Punctuality was marked as a no, so that made me believe the client was late to the evaluation. But on Section 4 under Strengths, it was marked that the client arrived on time to the evaluation. Please let me know what is correct?" (FACTS Insert: It is important to note that clients can arrive late in the mornings, after the morning break and/or after the lunch break. The evaluator should always clearly specify what occurred with each individual.)

### Question 3

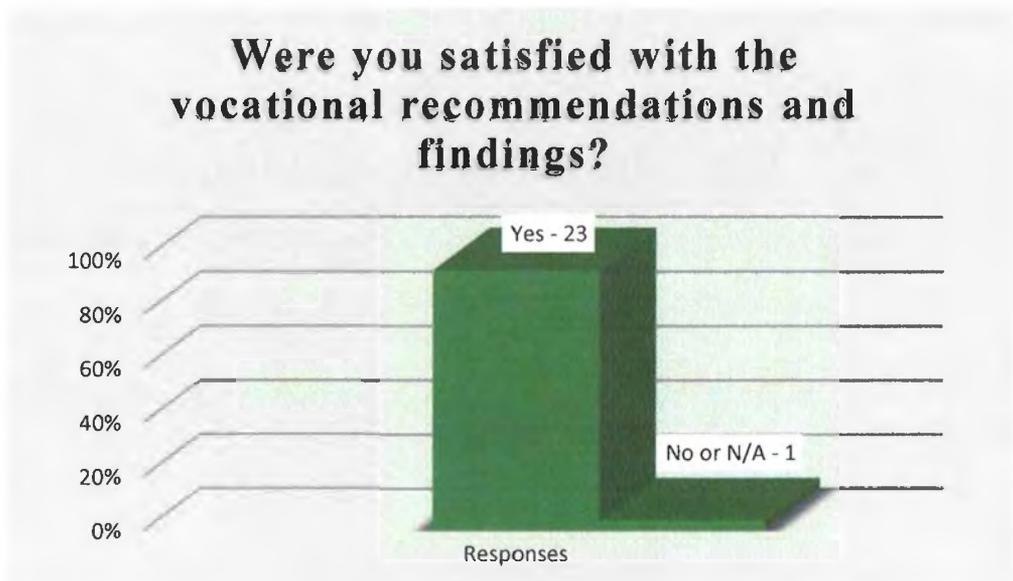


**Comments:** As depicted in the graph, 100% of the Job Specialists indicated that they were satisfied with the testing administered.

The following **positive comments** include Job Specialists' **feedback regarding the testing provided:**

- "Client states that she was happy with her experience. She states that the evaluation caused her to consider things about her learning that she never considered before."

### Question 4



**Comments:** Feedback from Job Specialists was positive and indicated 96% satisfaction with the vocational recommendations and findings provided in the assessment/LD evaluation report. One Job Specialists (totaling 4% of all responses) did not answer this question.

### *Recommendations for Improvement and Actions Taken*

Job Specialists are very helpful in suggesting areas in which FACTS could improve Limited English Proficiency (LEP) assessment and Learning Disability Evaluation (LDE) services. The following items opened communication between the Job Specialists and FACTS, and the following action was taken:

- FACTS evaluators and assessors should always be as clear as possible when reflecting a participant's participation and punctuality in the Limited English Proficiency assessment or Learning Disability Evaluation. Participant attendance documentation within the report is vital, and reflects on overall worker traits and potential to successfully participate within training programs and employment situations. As noted, clients can arrive late in the mornings, after the morning break and/or after the lunch break. The evaluator should always specify what occurred with each individual, and make that documentation as clear as possible.

Covid-19 has dramatically and negatively impacted referrals for the previous year, and results are therefore limited to these submitted feedbacks. However, Job Specialists continue to report appreciation for the services that FACTS has provided to participants in the past and have expressed that they wish to continue receiving these Limited English Proficiency (LEP) assessment and Learning Disability Evaluation (LDE) services in the future. Other ideas for improvement will be discussed at quarterly contract meetings with Fresno County and during vocational evaluator training sessions. Input and ideas from Job Specialists, participants, as well as staff are welcomed and appreciated.

### *Conclusions:*

*The use and sharing of the feedback results summary with participants, referral sources, and FACTS' staff is an important aspect of continuously improving the limited English proficiency assessment and LD evaluation services that FACTS currently provides to participants. The use of this information is vital in both short-term and long-range planning, for fiscal management, and for quality service improvement.*

*FACTS will incorporate these Job Specialist Feedback Results Summary reports into upcoming quarterly staff training sessions. Investigation of common issues, concerns, brainstorming of solutions, and assessment of outcomes and results will occur at the quarterly staff training sessions.*

*Any questions or concerns regarding this study should be directed to Andrea Foster, CEO, MA, CVE, CWA, PVE, ABVE, IPEC at [AndreaFoster@FosterAssessment.com](mailto:AndreaFoster@FosterAssessment.com) or (805) 497-1685.*

# Limited English Proficiency Assessment



## *Testimonials*

“The results were very uplifting and helpful, as well as the Assessor’s input and suggestions.”

“This was such a positive, impactful experience. I learned a lot about myself and I am excited about my future.”

“The experience was educational and motivating towards my career goals.”

“I’m glad I had an opportunity like this to know where I stand academically.”

“I was concerned prior to starting that I would be expected to take the first [employment] position available and abandon my goals and dreams of my desired career path. I greatly appreciate my feedback and look forward to my new endeavors.”

A Limited English Proficiency Assessment will provide you with the opportunity to evaluate your aptitudes, academic abilities and vocational skills in order to appropriately plan your career. The goal of this program is to assist you in preparing for, attaining and thriving in employment while achieving self-sufficiency. You will work closely with an assessment professional. Your assessment results will be sent to your Employment Services Case Manager, who will help you implement your employment plan and give you a path towards achieving your goals.

### *Benefits of a Limited English Proficiency Assessment:*

- ◆ Learn how your language, reading and math skills relate to your job goals
- ◆ Learn how to improve your English skills
- ◆ Discuss ways to eliminate employment barriers
- ◆ Discover vocational interests
- ◆ Learn more about the job market
- ◆ Better understand your career ladder
- ◆ Start your path to success, self-sufficiency and independence!



**FOSTER  
ASSESSMENT  
CENTER &  
TESTING  
SERVICE, INC.**

**Your assessment is scheduled from 9:00 A.M to 3:00 P.M. :**

\_\_\_\_\_ **(Date)**

\_\_\_\_\_ **(Location)**

# Evaluación de Habilidad Limitada de Inglés



## *Testimonios*

“Los resultados fueron muy inspirantes y útiles.”

“Esta fue una experiencia positiva e impactante. Pude aprender mucho sobre mí y estoy emocionada por mi futuro.”

“La experiencia fue educacional y motivadora hacia mis metas educativas.”

“Me siento contenta de haber tenido una oportunidad como esta para saber cuál es mi posición académica.”

“Estaba preocupado antes de comenzar de que solamente me colocarían en la primera posición de empleo disponible y que tendría que abandonar mis metas y sueños. Pero estoy agradecido por las recomendaciones y tengo muchas ganas de empezar mis nuevas tareas.”

**Una Evaluación de habilidad limitada de inglés le proporcionará la oportunidad de evaluar sus aptitudes, habilidades académicas y vocacionales para poder planificar adecuadamente su carrera. El objetivo de este programa es para ayudarle en la preparación, obtención y progreso de su empleo y lograr la autosuficiencia. Usted trabajará junto a un profesional durante su evaluación quien le ayudará a realizar su plan de empleo hacia el logro de sus objetivos. Para concluir, un reporte con sus resultados será enviado a su Administrador de Servicios de Empleo, el cual le ayudara con su siguiente paso hacia su carrera.**

### **Beneficios de una Evaluación de Habilidad Limitada en Inglés:**

- ◆ Aprender cómo sus habilidades de lenguaje, lectura y matemáticas se relacionan con sus metas de empleo
- ◆ Aprender cómo mejorar sus habilidades en inglés
- ◆ Discutir maneras de eliminar obstáculos en el empleo
- ◆ Descubrir intereses vocacionales
- ◆ Más información sobre el mercado laboral
- ◆ Entender mejor la escala profesional
- ◆ Comenzar su camino hacia el éxito, autosuficiencia e independencia

**F**OSTER  
**A**SSESSMENT  
**C**ENTER &  
**T**ESTING  
**S**ERVICE, INC.

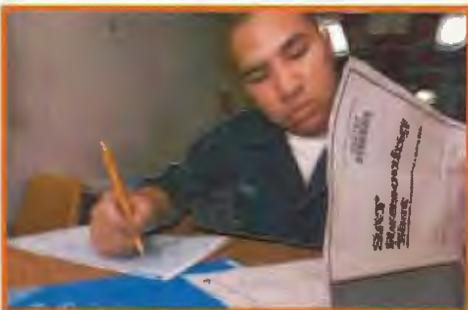
**Su evaluación esta:**

## Learning Style Evaluation

If you feel like you are trying in your educational courses, but you just cannot get the grades you need to pass the class, you may learn differently than others. It is not your fault.

A learning style evaluation will help you determine how you learn, may give you the tools you need to pass your classes, and help you obtain the job you want.

It is free, is completed in one day, and you will know at the end of the day if you are eligible for learning accommodations.



Ask your Case Manager for a learning style evaluation. **It will make a difference in your life.**

## Don't Wait Another Day

Isn't it time you took the steps to reach your full potential — both in school and with your career?

- It is free.
- It is local.
- It only takes a day.
- Evaluation results are immediate.
- It can change your life.



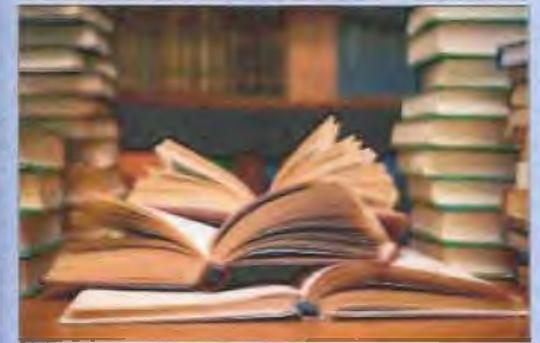
Call your Case Manager today and ask them to arrange a learning style evaluation. If you have had trouble learning information in school or on the job, you deserve the opportunity to find out why. You deserve a chance to get ahead. Do it for yourself.

Providing contacted services for the County of  
Fresno Department of Social Services

## Learning Style Evaluation

Are you *struggling*  
to get ahead...  
but you have had  
*trouble learning*  
in school?

**We can help.**



**The date of your evaluation is:**

**from 9:00 A.M. to 4:00 P.M. at**

**2350 West Shaw Avenue,  
Suite 118  
Fresno, CA 93711**

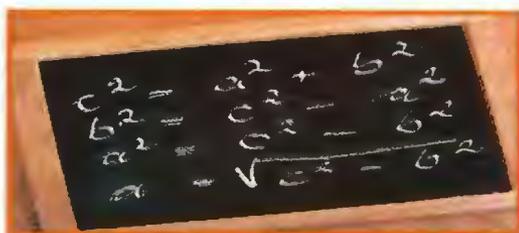
# ≡ Learning Style Evaluation

## Why do I have trouble learning?

Sometimes people can read this brochure and understand what is written the first time. Other people need to read it two, three or more times in order to understand the main idea.



Some people can work well with numbers, math formulas and understand the reasoning behind calculations and computations. But others have trouble even memorizing times tables.



Some people have just never been good at spelling or writing, regardless of the amount of effort they expend. They may have trouble listening to the teacher, answering questions in class, or even remembering what was taught.

## What happens during the evaluation?

During the evaluation you will be given a series of tests to determine not only your current academic skills, but your potential to learn. Even though testing may be difficult for you, you may find that these tests are not like others you have taken.

The tests include not only reading, spelling, and math, but look at skills involving your ability to listen, visualize images, knowledge of words and your ability to memorize things.

The trained Evaluators from Foster Assessment Center & Testing Service, Inc. (FACTS) are specialists that will guide you through each step of the evaluation, which starts at 9:00 AM, and finishes at 3:00 PM (with a one hour break for lunch). By the end of the day you will know your style of learning, and how to maximize your ability to learn new information, whether it is in a classroom situation or on the job.



## How can the results of the evaluation really help me?

If the results of the evaluation show that you have struggled in school or that you learn slower or differently than most people, you may be eligible for learning accommodations. Accommodations are a way to level the playing field so that you have the tools you need in order to absorb the information to make you successful in the classroom or on the job.



Accommodations can include things like using a calculator (even during testing), having extra time on tests and quizzes and/or listening to your textbooks through a headset. Accommodations depend on the results of your testing, and they are free to you.

### How do I ask for a learning style evaluation?

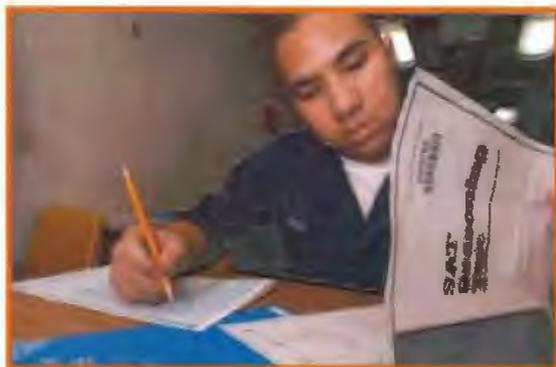
Contact your Case Manager today and let them know you read this brochure. Ask them to arrange a learning style evaluation. Foster Assessment Center & Testing Service, Inc. will help you identify your learning style and recommend any accommodations you need to be successful.

## Evaluación de Estilo de Aprendizaje

Si siente que está tratando en los cursos educativos, pero nada más no tiene los grados que necesita para pasar la clase, quizá aprende diferente que otros. No es su culpa.

Una evaluación de estilo de aprendizaje le ayudará a determinar cómo aprende, puede darle las herramientas que necesita para pasar sus clases y ayudarle a obtener el trabajo que quiere.

La evaluación es gratis, hecha en un día, y al final del día sabrá su estilo de aprendizaje y si es elegible para modificaciones para su estilo de aprendizaje.



Pídale a su trabajador de caso una evaluación de estilo de aprendizaje. **Puede hacer una diferencia en su vida.**

## No Espere Otro Día Mas

¿Qué no es tiempo que tome las medidas para alcanzar su potencial completo — tanto en la escuela y con su carrera? La Evaluación del Estilo de Aprendizaje

- es gratis
- se hace localmente
- sólo toma un día
- resultados de la evaluación son concretos

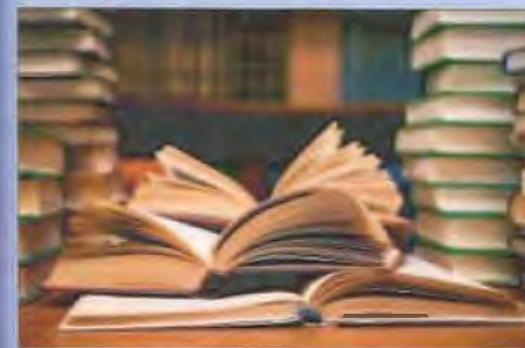


Llame hoy a su trabajador de caso y pida que le haga una cita para una evaluación de estilo de aprendizaje. Si ha tenido problemas aprendiendo información en la escuela o en el trabajo se merece la oportunidad de averiguar la razón. Se merece una oportunidad para salir adelante. Hágalo por usted mismo.

Proporcionando servicios bajo contrato para el Departamento de Servicios Sociales del condado de Fresno. Programa es financiado a través de diversas entidades gubernamentales de financiamiento.

## Evaluación de Estilo de Aprendizaje

¿Está luchando por salir adelante... o ha tenido problemas para aprender en la escuela?



**Nosotros podemos ayudar.**

La fecha(s) de su evaluación son:

Es de 9:00 A.M. a 3:00 P.M.

**Foster Assessment Center & Testing Service, Inc.**  
**2350 West Shaw Avenue, Ste. 118,**  
**Fresno, CA 93711**

# ≡ Evaluación de Estilo de Aprendizaje

## ¿Por qué tengo problemas aprendiendo?

A veces la gente puede leer este folleto y entender lo que está escrito la primera vez. Otras personas necesitan leer dos, tres o más veces para comprender la idea principal.



Algunas personas pueden trabajar con números, fórmulas matemáticas y entender el razonamiento detrás de las calculaciones. Sin embargo a usted se le dificulta hasta memorizar las tablas de multiplicación.



Algunas personas nunca han sido buenas en ortografía o escritura, independientemente de la cantidad de esfuerzo que le ponen al tratar. A lo mejor tienen problemas para escuchar al profesor, respondiendo preguntas en clase o incluso recordando lo que fue enseñado.

## ¿Qué sucede durante la Evaluación?

Durante la evaluación de estilo de aprendizaje se le darán las pruebas para determinar no sólo sus habilidades académicas actuales, pero también su potencial para aprender. Aunque la prueba puede ser difícil para usted, usted puede encontrar que estas pruebas no son como otras que ha tomado. Las pruebas incluyen lectura, ortografía y matemáticas, las cuales nos ayudaran a determinar sus habilidades tocante su capacidad para escuchar, visualizar imágenes, conocimiento de palabras y su capacidad para memorizar las cosas.

Evaluadores de Foster Assessment Center & Testing Service, Inc. (FACTS) son entrenados especialistas quienes la/lo guiará a través de cada paso de la evaluación, que comienza a las 9:00 de la mañana y termina a las 3:00 de la tarde (con un descanso de una hora para el almuerzo). Al final del día sabrá su estilo de aprendizaje y cómo maximizar su capacidad para aprender información nueva, sea en una clase o en el trabajo.



## ¿Cómo realmente me pueden ayudar los resultados de la evaluación de estilo de aprendizaje?

Si los resultados de la evaluación muestran que ha tenido problemas en la escuela o que aprende más lento o diferentemente que la mayoría de la gente, usted puede ser elegible para ajustes de aprendizaje. Estas modificaciones le ayudaran a estabilizar su estilo de aprendizaje, ya que servirán de herramientas que necesita para absorber información y ayudarle a tener éxito en la clase o en el trabajo. Las modificaciones puede incluir cosas



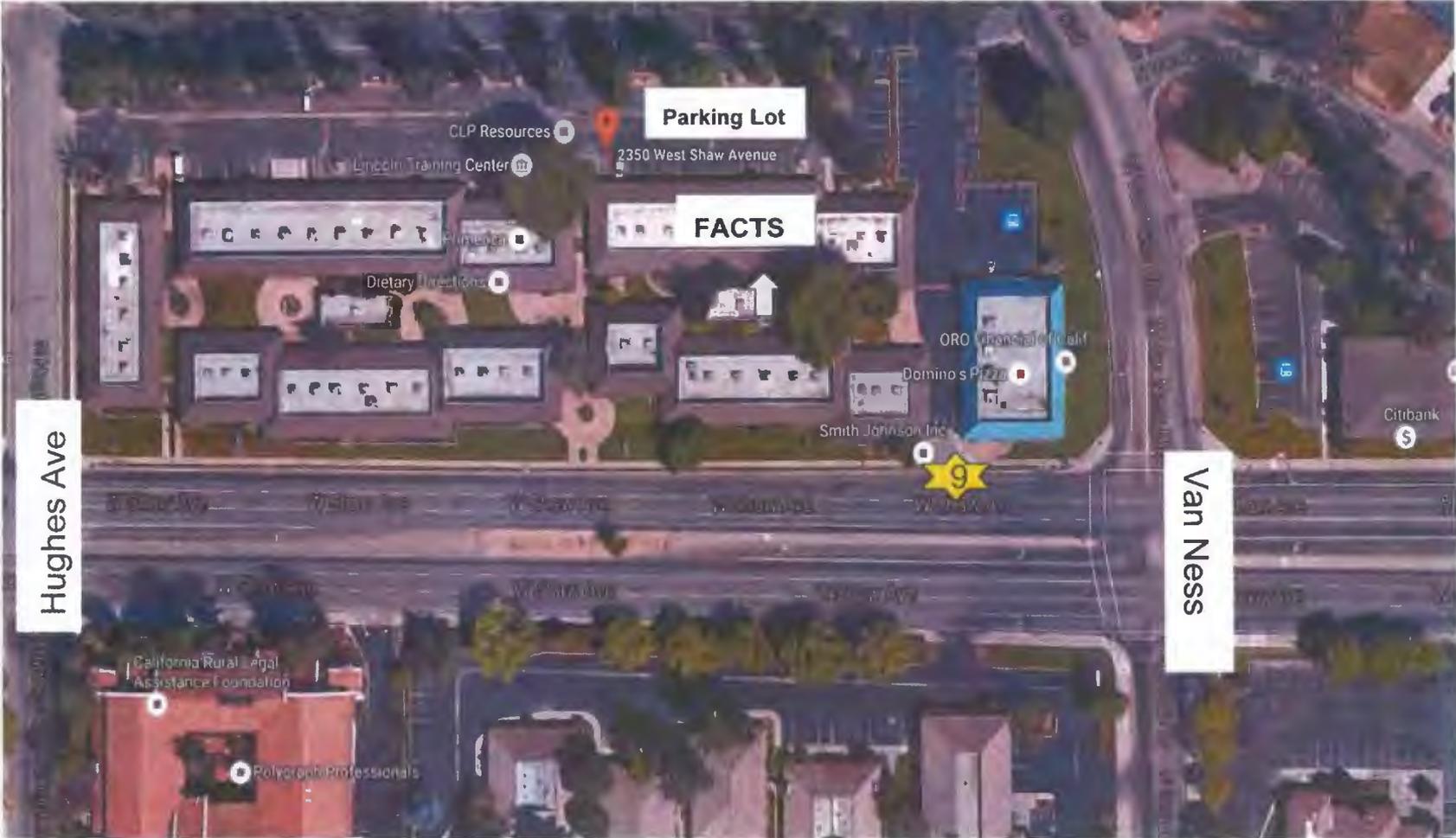
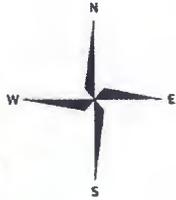
como; usando una calculadora (hasta durante las pruebas), tener tiempo extra en las pruebas y cursos o escuchando sus libros a través de un audio. Las modificaciones depende de los resultados de su prueba, y son gratis para usted.

### ¿Cómo pido una evaluación de estilo de aprendizaje?

Comuníquese hoy mismo con su trabajador de caso y déjele saber que usted leyó este folleto. Él o ella organizará una evaluación de estilo de aprendizaje. Foster Assessment Center & Testing Service, Inc. le va a ayudar a identificar su estilo de aprendizaje y recomendar cualquier modificación que usted necesita para tener éxito.

Foster Assessment Center & Testing Service, Inc.  
**(FACTS)**

2350 West Shaw Ave., Suite #118  
Fresno, CA 93711



Addendum 16—FACTS Fresno Center Map



**9** Bus stop location  
260

For Assistance, please call  
(559)721-7488

**FOSTER ASSESSMENT CENTER & TESTING SERVICE, INC. - FRESNO**  
 Referral and Attendance Report  
 Fiscal Year 21/22

**July 1 - 31, 2021**

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	4	2	50%	2	11	7	64%	3	1	2	1	1
Reedley	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Selma	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>4</b>	<b>2</b>	<b>50%</b>	<b>2</b>	<b>11</b>	<b>7</b>	<b>64%</b>	<b>3</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>1</b>
<b>Total FY 2020/2021</b>	<b>0</b>	<b>0</b>	<b>4</b>	<b>2</b>	<b>50%</b>	<b>2</b>	<b>11</b>	<b>7</b>	<b>64%</b>	<b>3</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>1</b>

271

**August 1-31 2021**

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	4	0	0%	4	8	8	100%	0	0	0	0	0
Reedley	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Selma	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>4</b>	<b>0</b>	<b>0%</b>	<b>4</b>	<b>8</b>	<b>8</b>	<b>100%</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total FY 2020/2021</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>2</b>	<b>25%</b>	<b>6</b>	<b>19</b>	<b>15</b>	<b>79%</b>	<b>3</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>1</b>

### September 1-30, 2021

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	5	2	40%	3	7	3	43%	3	1	2	1	1
Reedley	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Selma	0	0	1	0	0%	1	0	0	0%	0	0	0	0	0
Total	0	0	6	2	33%	4	7	3	43%	3	1	2	1	1
Total FY 2020/2021	0	0	14	4	29%	10	16	18	69%	6	2	4	2	2

### October 1-31, 2021

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	3	3	100%	0	7	4	57%	1	2	2	0	1
Reedley	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Selma	0	0	0	0	0%	0	1	0	0%	1	0	1	0	0
Total	0	0	3	3	100%	0	8	4	50%	2	2	3	0	1
Total FY 2020/2021	0	0	17	7	41%	10	34	22	65%	8	4	7	2	3

### November 1-30, 2021

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	3	1	33%	2	6	2	33%	2	2	2	0	2
Reedley	0	0	0	0	0%	0	1	0	0%	1	0	1	0	0
Selma	0	0	0	0	0%	0	1	0	0%	1	0	1	0	0
Total	0	0	3	1	33%	2	8	2	25%	4	2	4	0	2
Total FY 2020/2021	0	0	20	8	40%	12	42	24	57%	12	6	11	2	5

### December 1-31, 2021

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	9	3	33%	6	10	3	30%	3	4	5	1	1
Reedley	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Selma	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Total	0	0	9	3	33%	6	10	3	30%	3	4	5	1	1
Total FY 2020/2021	0	0	29	11	38%	18	52	27	52%	15	10	16	3	6

**January 1-31, 2022**

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	7	1	14%	6	10	4	40%	2	4	3	2	1
Reedley	0	0	1	0	0%	1	0	0	0%	0	0	0	0	0
Selma	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Total	0	0	8	1	13%	7	10	4	40%	2	4	3	2	1
Total FY 2020/2021	0	0	37	12	32%	25	62	31	50%	17	14	19	5	7

**February 1-28, 2022**

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	9	0	0%	9	11	7	64%	3	1	3	0	1
Reedley	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Selma	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Total	0	0	9	0	0%	9	11	7	64%	3	1	3	0	1
Total FY 2020/2021	0	0	46	12	26%	34	73	38	52%	20	15	22	5	8

**March 1-31, 2022**

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	18	7	39%	11	17	9	53%	5	3	7	1	0
Reedley	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Selma	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>18</b>	<b>7</b>	<b>39%</b>	<b>11</b>	<b>17</b>	<b>9</b>	<b>53%</b>	<b>5</b>	<b>3</b>	<b>7</b>	<b>1</b>	<b>0</b>
<b>Total FY 2020/2021</b>	<b>0</b>	<b>0</b>	<b>64</b>	<b>19</b>	<b>30%</b>	<b>45</b>	<b>90</b>	<b>47</b>	<b>52%</b>	<b>25</b>	<b>18</b>	<b>29</b>	<b>6</b>	<b>8</b>

**April 1-30, 2022**

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	9	3	33%	6	15	5	33%	5	5	7	0	3
Reedley	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Selma	0	0	0	0	0%	0	1	0	0%	1	0	1	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>9</b>	<b>3</b>	<b>33%</b>	<b>6</b>	<b>16</b>	<b>5</b>	<b>31%</b>	<b>6</b>	<b>5</b>	<b>8</b>	<b>0</b>	<b>3</b>
<b>Total FY 2020/2021</b>	<b>0</b>	<b>0</b>	<b>73</b>	<b>22</b>	<b>30%</b>	<b>51</b>	<b>106</b>	<b>52</b>	<b>49%</b>	<b>31</b>	<b>23</b>	<b>37</b>	<b>6</b>	<b>11</b>

**May 1-31, 2022**

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	13	5	38%	8	9	7	78%	2	0	2	0	0
Reedley	0	0	0	0	0%	0	0	0	0%	0	0	0	0	0
Selma	0	0	1	0	0%	1	0	0	0%	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>14</b>	<b>5</b>	<b>36%</b>	<b>9</b>	<b>9</b>	<b>7</b>	<b>78%</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>
<b>Total FY 2020/2021</b>	<b>0</b>	<b>0</b>	<b>67</b>	<b>27</b>	<b>31%</b>	<b>60</b>	<b>115</b>	<b>59</b>	<b>51%</b>	<b>33</b>	<b>23</b>	<b>39</b>	<b>6</b>	<b>11</b>

**June 1-30, 2022**

LOCATION	# SA Referred	#SA Assessed	# LEP Referred	# LEP No Shows	LEP No-Show Percent	# LEP Assessed	# LD Referred	# LD No-Shows	LD No-Show Percent	# LD Evaluated		# LD	#ID	# Not LD or ID
										LDE	LDP			
FACTS-Fresno	0	0	22	3	14%	19	11	7	64%	3	1	2	0	2
Reedley	0	0	2	0	0%	2	1	1	100%	0	0	0	0	0
Selma	0	0	0	0	0%	0	1	0	0%	1	0	1	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>24</b>	<b>3</b>	<b>13%</b>	<b>21</b>	<b>13</b>	<b>8</b>	<b>62%</b>	<b>4</b>	<b>1</b>	<b>3</b>	<b>0</b>	<b>2</b>
<b>Total FY 2020/2021</b>	<b>0</b>	<b>0</b>	<b>111</b>	<b>30</b>	<b>27%</b>	<b>81</b>	<b>128</b>	<b>67</b>	<b>52%</b>	<b>37</b>	<b>24</b>	<b>42</b>	<b>6</b>	<b>13</b>

**County of Fresno - LEP**  
**Foster Assessment Center & Testing Service, Inc.**  
**Department of Social Services FY 2021-2022**

LEP	SPANISH	ARABIC	HMONG	LAOS	PUNJABI	CREOLE	RUSSIAN	PERSIAN/FARSI	ARMENIAN	FRENCH	PASHTO	AMBODIA	TOTAL
JULY	2												2
AUGUST	2		1			1							4
SEPTEMBER	3				1								4
OCTOBER	0	0											0
NOVEMBER	2												2
DECEMBER	3	2								1			6
JANUARY	6									1			7
FEBRUARY	6	1						2					9
MARCH	6							5					11
APRIL	3				1			1			1		6
MAY	7		1					1					9
JUNE	10						11						21
<b>TOTALS</b>	<b>50</b>	<b>3</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>11</b>	<b>5</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>61</b>

## Addendum 18 – Performance Measure Outcomes Chart

Performance Measure	FACTS Expected Level of Performance
Referrals Assessed	95% of all Department-referred clients who attend the assessment/evaluation will complete.
Completion Rate	100% of all assessment/evaluation reports shall be finalized and results will be made available to DSS within 5 business days from the date the participant completes the assessment/evaluation.
Language Availability	100% of all Department-referred clients will be assessed/evaluated in their primary designated language.
Scheduling of Referred Participants	All participants referred for an assessment/evaluation will be contacted within one day in order to schedule their appointment. The appointment shall generally be within one week from receipt of referral for participants attending at our FACTS Fresno location and within two weeks of rural areas where staff travels. FACTS is able to accommodate referrals earlier as requested.
No Show Participants	100% of all Department-referred clients will be phoned or emailed by FACTS if they fail to attend their scheduled assessment within one day of their initial absence.
Facility	FACTS will maintain a CARF accredited and ADA accessible facility within metro Fresno.
Department Staff Training	A minimum of five training activities per contract year will be performed. Upon request, FACTS will be available to provide additional training on Learning Disabilities, Limited English Proficiency Assessments and Independent Assessments to DSS department staff and department contracted staff at a time convenient to both parties.
JobWISE Participant Training	A minimum of two training activities per month will be performed. Upon request, FACTS will be available through Zoom to provide training on Learning Disabilities to participants in DSS Job Readiness (JobWISE) program.
WTW Client Orientation Video	A minimum of one recorded informational video will be created annually to help new WTW participants engage in the learning disability evaluation program.

Requested DSS MAR Reports	FACTS will provide DSS monthly activity reports (MAR) which shall include data requested by DSS to track current activities for each participant and evaluate outcomes and success of the overall program.
Invoicing Procedures	A complete invoice including backup documentation per specifications of DSS will be provided within ten business days of the end of each month as requested by the County.
Monitoring	FACTS will meet with DSS quarterly for performance monitoring as needed or requested.
Record Retention	FACTS will maintain adequate files and records for 100% of department-referred clients.
Participant Satisfaction Feedback Report	A detailed report of feedback provided by participants will be gathered, analyzed (by an outside objective source) and presented to DSS annually. FACTS' goal is that 95% of all participant responses be satisfied with the results of their assessment.
Job Specialist Satisfaction Feedback Summary Report	A detailed report of feedback provided by Job Specialists will be gathered, analyzed (by an outside objective source) and presented to DSS annually. FACTS' goal is that 95% of all Job Specialist's responses be satisfied with the vocational recommendations, learning disability findings and WTW plan.
Accommodations	FACTS shall maintain a list of the most current and acceptable accommodations for participants found to be learning disabled. FACTS will include these recommended accommodations within the evaluation report.
Testing Instruments	FACTS will maintain an abundant array of testing instruments for Learning Disability, Limited English Proficiency and Independent assessment referrals, including hands on work samples, written psychometrics, interests and personality indices. Only recognized and validated testing instruments will be utilized.
Certifications, Licenses, Registrations and Memberships	FACTS staff will maintain all professional certifications awarded, and for new assessors, educational plans will be put in place in order for them to achieve certification, license, registration and/or membership within thirty (30) days of hiring.

# COUNTY OF FRESNO



## REQUEST FOR PROPOSAL

**NUMBER: 23-006**

## WELFARE-TO-WORK SPECIALIZED ASSESSMENTS

**Issue Date: August 26, 2022**

**Closing Date: SEPTEMBER 23, 2022 AT 10:00 A.M.**

All Questions and Responses must be electronically submitted on the Bid Page on Public Purchase.

For assistance, contact **Margo Jacobie** at Phone (559) 600-7110.

### BIDDER TO COMPLETE

Undersigned agrees to furnish the commodity or service stipulated in the attached at the prices and terms stated in this RFP.  
Bid must be signed and dated by an authorized officer or employee.

#### Brain Learning Psychological Corp

COMPANY

**Dr. Rienzi Haytasingh / Erin Haytasingh**

CONTACT PERSON

**8220 University Ave, STE 202**

ADDRESS

**La Mesa**

**CA**

**91942**

CITY

STATE

ZIP CODE

( ) **(619) 324-9764**

**rienzi.calworks@brainlearning.com**

TELEPHONE NUMBER

E-MAIL ADDRESS

AUTHORIZED SIGNATURE

**Dr. Rienzi Haytasingh**

**Owner**

PRINT NAME

TITLE

# COUNTY OF FRESNO



## ADDENDUM NUMBER: ONE (1)

## RFP NUMBER: 23-006

## WELFARE-TO-WORK SPECIALIZED ASSESSMENTS

Issue Date: September 13, 2022

Closing Date: September 23, 2022 at 10:00 AM

All Questions and Proposals must be electronically submitted to the Bid Page on Public Purchase.

For assistance, contact Heather Stevens at (559) 600-7110.

**NOTE THE ATTACHED ADDITIONS, DELETIONS AND/OR CHANGES TO THE REQUIREMENTS OF REQUEST FOR PROPOSAL NUMBER: 23-006 AND INCLUDE THEM IN YOUR RESPONSE. PLEASE SIGN AND RETURN THIS ADDENDUM WITH YOUR PROPOSAL.**

➤ **Questions and Answers**

**ACKNOWLEDGMENT OF ADDENDUM NUMBER ONE (1) TO RFP 23-006**

COMPANY NAME: Brain Learning Psychological Corp  
(PRINT)

SIGNATURE: 

NAME & TITLE: Rienzi Haytasingh / Owner  
(PRINT)

Purchasing Use: HS:st

ORG/Requisition: 56107001 / 5612300136

B. COVER LETTER:

My name is Dr. Rienzi Haytasingh and I'm humbled by the opportunity to submit this important letter of interest to conduct the CalWORKS Welfare-to-Work Learning Disabilities Evaluations for the County of Fresno. I have worked with individuals with disabilities for over 25 years. I have a doctorate in educational psychology with post doctoral training in neuropsychology. I currently hold diplomate status with the American Board of School Neuropsychology and am a Licensed Educational Psychologist (LEP) in the state of California. I spent over 12 years as a school psychologist in public schools. I have been training and mentoring graduate students in the area of school psychology for over 20 years. I have held teaching positions at seven California Universities. Today, I am a clinical supervisor and mentor for a school of neuropsychology postdoctoral training program. I believe in educating people about disabilities and helping train those who want to help others.

In 2014 I founded Brain Learning Psychological Corporation (Brain Learning) to continue my passion of serving individuals with disabilities throughout California. Brain Learning currently employs seven diverse and passionate educational psychologists (including myself) who regularly assess CalWORKS recipients. Brain Learning conducts culturally competent Learning Disability Evaluations for the CalWORKS programs in San Diego County, Lake County, and Sonoma County.

Company:

Brain Learning Psychological Corporation (s-corp)

8220 University Ave. STE 202 La Mesa, CA 91942 P: 619 786-1329

Contact and Authorized Representatives:

Owner: Dr Rienzi Haytasingh P: 619 655-1910



Director: Erin Haytasingh P: 619 786-1329



Address: 8220 University Ave. STE 202 La Mesa, CA 91942

**C. TABLE OF CONTENTS:**

<b>A. RFP PAGE 1</b>	<b>1</b>
<b>ADDENDUM NUMBER 1: PAGE 1</b>	<b>2</b>
<b>B. COVER LETTER:</b>	<b>3</b>
<b>C. TABLE OF CONTENTS:</b>	<b>4</b>
<b>D. CONFLICT OF INTEREST STATEMENT:</b>	<b>6</b>
<b>E. TRADE SECRET:</b>	<b>6</b>
<b>F. CERTIFICATION - DISCLOSURE - CRIMINAL HISTORY &amp; CIVIL ACTIONS:</b>	<b>8</b>
<b>G. REFERENCES:</b>	<b>9</b>
<b>H. PARTICIPATION:</b>	<b>10</b>
<b>I. EXCEPTIONS:</b>	<b>11</b>
<b>J. VENDOR COMPANY DATA:</b>	<b>11</b>
a. Experience with problems associated with this service:	11
b. Description of similar or related contracts:	12
c. Descriptions of the qualifications of the individuals providing the services:	13
d. LETTERS OF SUPPORT OR ENDORSEMENT:	14
e. Description of Current Operations/ Ability to Provide Service:	17
f. Compiled Statements and three years of corresponding federal tax returns:	17
g. Terminated Contract: N/A	17
h. Lawsuits: N/A	17
i. Payment problems: N/A	17
<b>K. SCOPE OF WORK:</b>	<b>18</b>
a. Essence of our proposal:	18
b.i. General discussion of understanding of the project, scope of work and a summary of the features of your proposal.	18
b.ii. Scope of Work:	18
For LDE assessment:	18
For LEP Evaluatations:	19
For Third Party Review:	20
Summary of features of our proposal:	20

b.ii. Scope of Work:	21
1. SERVICES:	21
Process for Scheduling Participants:	21
Time Between initial referral and Contact:	21
Strategies for contacting Participants:	22
Average assessment timeframe:	22
Number of Assessments per month:	22
Proposed service schedule:	23
Proposed Locations(s) of the proposed service site(s):	23
Optional Additional Requested Services:	24
a. Training Staff:	24
b. Presenting to Participants	24
c. Client Orientation Video:	24
Implementation Timeline:	25
2. ORGANIZATION AND STAFF QUALIFICATIONS:	26
a. Psychologists:	26
b. Fiscal Staff:	26
3. DOCUMENTATION AND RECORD KEEPING:	27
a. Documenting participant assessment outcomes:	27
Reports:	27
Data:	27
b. Responsible party of documentation:	28
c. Time Allocation	28
4. Describe your agency's ability to:	28
a. Maintain and secure confidential records:	28
b. Collect data consistently:	28
c. Track qualitative and quantitative outcomes:	28
5. Describe your agency's planned method to securely provide DSS with:	28
a. Monthly activity reports:	28
b. Monthly invoices:	28
c. Participant assessment reports:	29
c. Sample Reports:	29
d. Alternative Solutions or Approaches:	29
<b>L. COST PROPOSAL: (Exhibit A)</b>	<b>30</b>
<b>M. CHECK LIST:</b>	<b>33</b>
<b>N. SAMPLE REPORTS- Exhibit B:</b>	<b>34</b>
Sample LDE Report	34
Sample LEP Report	51

**D. CONFLICT OF INTEREST STATEMENT:**

We do not anticipate any conflict of interests developing while working with the County of Fresno. Brain Learning does not have private or public contracts with any agencies or other County Departments.

**E. TRADE SECRET:**

Brain Learning does not claim any confidentiality of any bid information submitted to the County of Fresno. Signed Trade Secret Acknowledgement (Exhibit B)

**TRADE SECRET ACKNOWLEDGEMENT**

Each proposal submitted is public record under the California Public Records Act (Cal. Gov. Code, secs. 6250 and following) and is therefore open to inspection by the public as required by Section 6253 of the California Government Code. This section generally states that "every person has a right to inspect any public record". The County will not exclude any proposal or portion of a proposal from treatment as a public record except information that is properly submitted as a "trade secret" (defined below), and determined by the County to be a "trade secret" (if not otherwise subject to disclosure, as stated below). Information submitted as "proprietary", "confidential" or under any other terms that might state or suggest restricted public access will not be excluded from treatment as public record.

"Trade secrets" as defined by Section 6254.7 of the California Government Code are not treated as a public record under that section. This section defines trade secrets as:

*"...Trade secrets," as used in this section, may include, but are not limited to, any formula, plan, pattern, process, tool, mechanism, compound, procedure, production data or compilation of information that is not patented, which is known only to certain individuals within a commercial concern who are using it to fabricate, produce, or compound an article of trade or a service having commercial value and which gives its user an opportunity to obtain a business advantage over competitors who do not know or use it."*

Such information must be submitted in a separate PDF file named "Trade Secret" and marked as "Confidential" in the Public Purchase system. Bidders must include a clear and concise statement that sets out the reasons for confidentiality in accordance with the foregoing definition of "trade secret." Examples of information not considered trade secrets are pricing, cover letter, promotional materials, references, and the like.

Information submitted by a bidder as "trade secret" will be reviewed by County of Fresno's Purchasing Division, with the assistance of the County's legal counsel, to determine conformance or non-conformance to the foregoing definition.

Information that is properly identified as "trade secret" and which the County determines to conform to the definition will not become public record (if not otherwise subject to disclosure, as stated below). The County will safeguard this information in an appropriate manner, provided however, in the event of a request, demand, or legal action by any person or entity seeking access to the "trade secret" information, the County will inform the bidder of such request, demand, or legal action, and the bidder shall defend, indemnify, and hold harmless the County, including its officers and employees, against any and all claims, liabilities, damages, or costs or expenses, including attorney's fees and costs, relating to such request, demand or legal action, seeking access to the "trade secret" information.

Information submitted by bidder as trade secret and determined by the County not to be in conformance with the foregoing California Government Code definition shall be excluded from the proposal and deleted by the County.

The County shall not in any way be liable or responsible for the disclosure of any proposals or portions thereof, if (1) they are not electronically submitted in a separate PDF that is marked "Trade Secret" and marked as Confidential in the Public Purchase system; or (2) disclosure thereof is required or allowed under the law or by order of court.

Bidders are advised that the County does not wish to receive trade secrets and that bidders are not to supply trade secrets unless they are absolutely necessary.

I have read and understand, and agree to the above "Trade Secret Acknowledgement."

**BIDDER MUST CHECK ONE OF THE FOLLOWING:**

Has bidder submitted certain bid information that is a "trade secret," as defined by Section 6254.7 of the California Government Code, and in compliance with the requirements of this Trade Secrets Acknowledgement?

By marking "NO", bidder does not claim any confidentiality of any bid information submitted to the County.

YES       NO

**ACKNOWLEDGED AND AGREED BY BIDDER:**

 \_\_\_\_\_ Date **09/23/2022**

**Dr. Rienzi Haytasingh** \_\_\_\_\_ Title **Owner**

### CERTIFICATION

(1) The prospective primary participant certifies to the best of its knowledge and belief, that it, its owners, officers, corporate managers and partners:

(a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency;

(b) Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

(c) Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.

(2) Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Signature: 

Date: 09/23/2022

**Dr. Rienzi Haytasingh / Owner**  
(Printed Name & Title)

**Brain Learning Psychological Corp**  
(Name of Agency or Company)

## REFERENCE LIST

### VENDOR MUST COMPLETE AND RETURN WITH REQUEST FOR PROPOSAL

Firm: Brain Learning Psychological Corp

Provide a list of at least five (5) customers for whom you have recently provided similar services. If you have held a contract for these or similar services with the County of Fresno within the past seven (7) years, list the County as one of your customers. Please list the person most familiar with your contract. Be sure to include all requested information.

Reference Name: EQUUS: North Regional SD Contact: Yolly Zabala  
 Address: 613 W Valley Parkway, Suite 200  
 City: Escondido State: CA Zip: 92025  
 Phone No.: ( 760 ) 215-9502 Project Date: November 2021 - Current  
 Service Provided: Subcontract for the purpose of delivering comprehensive Learning Disability Testing services to Welfare-to-Work (WTW) participants in the North Region of San Diego County.

Reference Name: County of Lake LCDSS Contact: Jessica Holloway  
 Address: 9055 CA-53  
 City: Lower Lake State: CA Zip: 95457  
 Phone No.: ( 707 ) 995-4391 Project Date: July 2021 - Current  
 Service Provided: Conduct Learning Disability (LD) assessments for Welfare-to-Work (WTW) participants referred by LCDSS. If a LD exists, determine what work activity accommodations are necessary for the participant to participate in employment and training.

Reference Name: County of Sonoma Contact: Hope Hamby  
 Address: 2227 Capricorn Way, Suite 100  
 City: Santa Rosa State: CA Zip: 95407  
 Phone No.: ( 707 ) 565-5646 Project Date: July 2022 - Current  
 Service Provided: Conduct Learning Disability (LD) assessments for Welfare-to-Work (WTW) participants referred by County of Sonoma, determine what work activity accommodations are necessary for the participant to participate in employment and training.

Reference Name: Public Consulting Group Contact: AJ Antum  
 Address: Multiple Locations in South, East and Central San Diego County  
 City: Chula Vista, El Cajon, San Diego State: CA Zip: \_\_\_\_\_  
 Phone No.: ( 619 ) 798-7049 Project Date: January 2019 - Current  
 Service Provided: Conduct Learning Disability (LD) assessments for Welfare-to-Work (WTW) participants referred by PCG, determine what work activity accommodations are necessary for the participant to participate in employment and training.

Reference Name: County of Lake LCDSS Contact: Theresa Showen  
 Address: 9055 CA-53  
 City: Lower Lake State: CA Zip: 95457  
 Phone No.: ( 707 ) 995-3749 Project Date: July 2021 - Current  
 Service Provided: Conduct Learning Disability (LD) assessments for Welfare-to-Work (WTW) participants referred by LCDSS. If a LD exists, determine what work activity accommodations are necessary for the participant to participate in employment and training.

***Failure to provide a list of at least five (5) customers may be cause for rejection of this RFP.***

### PARTICIPATION

The County of Fresno is a member of the California Association of Public Procurement Officials (CAPPO) Central Valley Chapter. This group consists of Fresno, Kern, Kings, and Tulare Counties and all governmental, tax supported agencies within these counties.

Whenever possible, these and other tax supported agencies co-op (piggyback) on contracts put in place by one of the other agencies.

Any agency choosing to avail itself of this opportunity, will make purchases in their own name, make payment directly to the contractor, be liable to the contractor and vice versa, per the terms of the original contract, all the while holding the County of Fresno harmless. If awarded this contract, please indicate whether you would extend the same terms and conditions to all tax supported agencies within this group as you are proposing to extend to Fresno County.

**\* Note: This form/information is not rated or ranked for evaluation purposes.**

Yes, we will extend contract terms and conditions to all qualified agencies within the California Association of Public Procurement Officials (CAPPO) Central Valley Chapter and other tax supported agencies.

No, we will not extend contract terms to any agency other than the County of Fresno.



(Authorized Signature)

**Dr. Rienzi Haytasingh / Owner**

Title

**I. EXCEPTIONS:**

Brain Learning meets the requirements of this proposal and notes no exceptions.

**J. VENDOR COMPANY DATA:**

**a. Experience with problems associated with this service:**

Brain Learning conducted its first CalWORKS Learning Disability Evaluation (LDE) for San Diego County in January 2019 and has continued to grow this area of assessment by partnering with additional counties throughout California. Brain Learning has successfully navigated challenges performing this service since beginning this work, not to mention assessing through the COVID-19 Pandemic. It is our belief that the work we do with CalWORKS recipients is of great value. We also believe these services are at times undervalued and not very well understood. Unfortunately despite all the progress made towards the acceptance of all people, disability still carries a stigma. Offering Learning Disability Evaluations to your clients is essential, however it can be a difficult or uncomfortable topic for county staff to approach with clients. Brain Learning believes that the ongoing training we provide on the culture of disabilities for all county staff is essential to empowering county workers to approach the sensitive topic of disability with their clients in order to best serve them. Brain Learning's primary objective is to provide meaningful information to each client in order to assist a client towards empowerment and self sufficiency. Many CalWORKS clients are referred to us at the beginning of their CalWORKS program which can mean that they are facing larger pressing issues like housing insecurity, lack of childcare, or food insecurity. These clients need to be evaluated for learning disabilities, however need to gain assistance on the pressing issues first. Brain Learning is flexible, patient, and compassionate with clients for scheduling. Our partnered counties are provided status updates on each referral on a regular basis. In some of our partnered counties, public transportation is difficult or inefficient. Brain Learning has assisted clients' transportation through UBER

when transportation is the barrier. More importantly, during the COVID-19 Pandemic, we began to utilize Zoom technology to conduct remote assessments for our clients in their homes. Remote testing remains one of our most successful barrier-reducing practices. From April 2020 to date we have conducted over 100 assessments remotely. Our psychological organizations and testing publishers provided specific guidance to conducting assessments remotely. Today, if it is a benefit to our client, they don't have to leave their homes to participate in the CalWORKS Assessment process.

**b. Description of similar or related contracts:**

Brain Learning currently provides CalWORKS Learning Disability Evaluations for:

- **San Diego County:** *South, East, and Central* (Subcontractor to Public Consulting Group)
- San Diego County: *North Regional* (Subcontractor to Equus).
- Lake County
- Sonoma County

In each of our partnered counties Brain Learning works uniquely with the county to meet its objectives and protocols. In two of our Counties Brain Learning schedules directly with the referred clients. One of our partnered counties protocol is for the employment case manager to schedule the testing appointment with the client. Brain Learning provides a schedule of availability in advance to this county to make this possible. Brain Learning prefers to handle scheduling directly with the client as there are many reasons a client may need to reschedule testing. Brain Learning finds it more efficient and less taxing to county staff's time to be able to make scheduling adjustments directly. In each of our partnered counties Brain Learning assesses in English and Spanish with educational psychologists and all other languages with the use of a translator. For Lake and Sonoma Counties: Brain Learning assesses:

- In person in County office
- Remotely from County Office
- Remotely with use of Client's computers

San Diego County:

- In Brain Learning Offices
- Remotely with use of Client's computers
- Prior to Covid-19 Pandemic, San Diego County offices were also used for in person testing. They no longer have their offices open to the public.

Remote from the County Offices:

- In Lake County, Brain Learning has provided a computer with a camera that is utilized by the County office to provide an area for the client to remotely test with Brain Learning educational psychologists. This works well for this county as it allows clients who live in rural areas without reliable internet connection to access remote testing.
- Sonoma County preferred to use their own hardware for remote testing taking place from the County offices.
- For San Diego County, most San Diego residents have been provided with Chromebooks through the CalWORKS program and internet access, so clients who prefer to do so, can test from their homes. Brain Learning provides ongoing training for each county as needed for new employees and annually for all staff.

**c. Descriptions of the qualifications of the individuals providing the services:**

Brain Learning psychologists have a minimum of a Masters in School Psychology with a PPS credential. Dr. Haytasingh and another of our psychologists hold a doctorate in School Psychology, five of our psychologists have their ABSNP which is a specialty in neuropsychology. Four of our psychologists are bi-lingual in English and Spanish.



COUNTY OF LAKE  
DEPARTMENT OF SOCIAL SERVICES  
P.O. Box 9000  
15975 Anderson Ranch Parkway  
Lower Lake CA 95457

**Brain Learning Psychological Corp**  
**Proposal No. 23-006**

Crystal Markytan  
*Social Services Director*

9/17/22

### LETTER OF RECOMMENDATION

To Whom it May Concern –

I am the Program Manager for the Lake County Department of Social Services, Employment Services Division. We contract with Brain Learning Psychological Corporation of Costa Mesa, California, for the CalWORKs Welfare-to-Work learning disability testing and evaluation services and have done so since 2019.

During the ongoing COVID pandemic, Brain Learning worked to develop a virtual process with which to continue testing and evaluation services that meets regulatory requirements. This has been a wonderful benefit to our clients, which we greatly appreciate.

After we refer a client, Brain Learning conducts the testing, assessment and prepares a comprehensive report which is reviewed with the client and includes strengths, deficiencies, severity of disability and accommodations/assistive technology that is needed. They work to support each client with the best service possible. They empower the client (and our staff as well) so she/he can advocate for themselves by understanding the disability and what supports they need in order to participate in our programs whether it be employment, education or other activities.

I am very impressed with Reinzi Haytasingh and his staff. They are truly driven by their passion for the work they do and it is evident in the way they communicate with staff and clients. They go the extra mile and have trained our staff to better understand learning disabilities and the impact a disability can have in the client's life. They truly have the client's best interests at heart.

I am happy to answer any questions you may have regarding the services provided by Brain Learning. You can reach me at [Theresa.showen@lakecountyca.gov](mailto:Theresa.showen@lakecountyca.gov) or by phone, 707 995-3749.

electronically signed 9/18/22

Theresa Showen  
Employment Services Division  
Lake County Department of Social Services  
9055 Highway 53  
Lower Lake CA 95457



Solutions that Matter

CalWORKS | County of Fresno

September 18, 2022

Dear Request for Proposal Reviewer,

Please accept this letter as an expression of my enthusiastic support to Brain Learning Psychological Corporation for their continues and endless effort in supporting our CalWORKs Employment Services participants in San Diego County.

Access to Learning Disability Services can be a major barrier to our participants. Brain Learning addresses this challenge to ensure participants have obtained the right services and accommodations to succeed in the classroom and in life and to maximize their potential. Brain Learning will offer contextualized bridge program to help prepare participants to succeed in vocational and technical training programs in their new career field.

Public Consulting Group (PCG) provides industry-leading management consulting and technology to help public sector education, health, human services, and other government clients achieve their performance goals and better serve populations in need. Founded in 1986 and headquartered in Boston, Massachusetts, PCG has nearly 1,800 professionals in 52 offices around the U.S., in Canada, and in Europe who are dedicated to delivering leading consulting approaches and technologies to public sector clients. In San Diego, we provide CalWORKs employment services to TANF recipients in the County's East, South and central Regions under contract with the County of San Diego. We operate offices in the City of Chula Vista, El Cajon and San Diego. PCG has worked closely with Brain Learning over the last three years in making referrals to their effective workforce programming.

PCG is hopeful that Brain Learning Request for proposal will be successful and looks forward to continuing working closely with Brain Learning by providing referrals to Brain Learning to help our participants in San Diego obtain professional careers and reach self-sufficiency.



Solutions that Matter

Saif Al Hakeem  
Assistant Director

619-270-4065 tel, 619-270-4151 fax  
PublicConsultingGroup.com

Follow us on:



September 20, 2022

RE: Brain Learning

To whom it may concern,

I am writing to express my pleasure in working with Brain Learning on our CalWORKs project. I have worked with Dr. Rienzi Haytasingh for the past three years, as Brain Learning has been our Learning Disability contractor for our CalWORKs project.

Dr. Haytasingh and Brain Learning have been very responsive to our needs and have worked with us to assess our customers and provide them resources to be successful in their journey towards self-sufficiency. Brain Learning continues to be a valuable partner in this area. We have regular quarterly meetings with them, and they are quite knowledgeable of the needs of our customers.

Furthermore, Brain Learning has been a valuable and dependable partner to us, providing regular refresher trainings for our staff when requested. They were also indispensable to us as we both navigated the unknowns of the Covid-19 pandemic and the shift from office to remote work.

I sincerely support Dr. Haytasingh as his heart is in the right place, and the work that Brain Learning does for our project and customers is invaluable.

Sincerely,



A.J. Antun  
Regional Director  
Public Consulting Group LLC

**e. Description of Current Operations/ Ability to Provide Service:**

Brain Learning employs support staff who each feel passionate about the opportunity to assist adults and families in reaching self sufficiency. Our office receives referrals from each of our partnered counties electronically via email. Our administrative assistant reaches out to clients within two business days of receipt of referral to schedule the client for testing. We have appointments within one week of the referral date and can schedule farther out based upon each client's needs. Testing appointments take place with an Educational Psychologist in person or virtually. Report is completed within one week. An appointment is scheduled for the psychologist to meet with client and employment case manager (ECM) in order to review findings/ recommendations of evaluation (results meeting) via video or three way phone conference. When the results meeting is completed, Brain Learning's accounting manager invoices for the completed evaluation according to the pay structure of the county (monthly, twice a month, or per completed evaluation).

**f. Compiled Statements and three years of corresponding federal tax returns:**

Available to be provided after the RFP closes, if requested.

**g. Terminated Contract: N/A**

Brain Learning has never had a contract terminated prior to completion. In fact, each of our contracts have been extended.

**h. Lawsuits: N/A**

Brain Learning has never been involved in a lawsuit or legal action.

**i. Payment problems: N/A**

Brain Learning has not encountered any payment problems with a county.

## **K. SCOPE OF WORK:**

### **a. Essence of our proposal:**

We provide information about our clients in an effort to prevent discrimination based on language and disability. By providing clients with thorough, meaningful evaluations we are able to directly educate clients on their strengths, weaknesses, vocational aptitudes and interests. We are able to provide clear pathways to working around weaknesses and obtaining accommodations if necessary in their continued education, employment and even when needed, within the CalWORKS system. Brain Learning is honored and proud to provide evaluations that are truly life changing for many of our clients.

### **b.i. General discussion of understanding of the project, scope of work and a summary of the features of your proposal.**

Brain Learning proposes to conduct culturally and linguistically appropriate LDE, LEP, and Third Party Reviews for Fresno County. As discussed throughout this proposal, Brain Learning currently conducts CalWORKS Learning Disability Evaluations for San Diego County, Lake County and Sonoma County. We are confident the experience we have gained while working with three vastly different counties has prepared us to serve Fresno County with their assessment needs. Brain Learning is collaborative in developing systems for each county we serve that reduce barriers to clients accessing evaluation services.

### **b.ii. Scope of Work:**

- **For LDE assessment:**

We choose culturally and linguistically appropriate tools and use only validated testing instruments to assess aptitude/processing, achievement (reading, writing, and math), and finally we use an online platform to assess vocational and personality traits of the client. Since a Learning Disability is a biologically based condition and in 99% of the cases would have impacted the client when they were much younger the clinical interview is of great importance in this process. Following the 3-4 hour clinical interview and testing session, the client is thanked

for their time and effort and the examiner begins scoring, interpreting, and writing the report. The examiner determines if the client meets DSM-5 eligibility for a Specific Learning Disability (SLD). Upon completion of the report, our office will schedule a results meeting with the client and their ECM to review the findings of the evaluation and the recommendations/ accommodations recommended. This results meeting allows the psychologist to empower a client with knowledge of their own strengths as well as constructive and clear ways to accommodate for their weaknesses. We review vocational interests and vocational strength and aptitude. When a client meets criteria for Specific Learning Disability the psychologist uses this opportunity to educate the client directly about their learning disability and what it means for them. The psychologist provides a meaningful pathway for next steps. All reports are specific to the client's own unique circumstances and outcomes. When a client qualifies for a specific learning disability, in addition to the full Learning Disability Assessment report they are provided an abbreviated report that provides the client written verification of their learning disability and accommodation that would be needed. This verification allows clients to present verification to schools, employers or other requesting entities without including background information of a client's health history or direct scores of the full confidential Learning Disability Report. The above process relates to a client who was educated in and whose primary language is either English or Spanish. If a client is referred to Brain Learning who was educated in a language other than English or Spanish, Brain Learning uses a translator and relies heavily on our clinical interview of the client. Validated testing instruments would be invalidated in translation so a clinical interview and clinical experience will be utilized to determine the presence of a learning disability.

- **For LEP Evaluations:**

We choose culturally and linguistically appropriate tools and use only validated testing instruments to assess aptitude/processing, achievement (reading, writing, and math), and finally we use an online platform to assess vocational and

personality traits of the client. We use the Woodcock-Johnson Oral Language Test, which is a standardized measure of English Language and Spanish proficiency. Following the 3-4 hour clinical interview and testing session, the client is thanked and the examiner begins scoring, interpreting, and writing the report. The examiner then determines if the client is a Limited English Proficient participating in the CalWORKS program. When a client meets criteria for LEP, the psychologist uses this opportunity to educate the client directly about their language skills and next steps to gain more English as well as provide the County with accommodations specific to the client.

- **For Third Party Review:**

For the Third Party Review, we conduct the evaluations using different testing instruments that were used in the first assessment. We would interview the client, social worker, and previous assessor in order to gain a complete perspective on the client's strengths and weaknesses. At Brain Learning 90% of our work with children is providing Third Party Review. Like our work with Children, we would take several steps to make sure this assessment is fair and objective in perceivably and in actuality. We would also look over the previous report with the client and attempt to understand their perspective and disagreement on the previous outcome. In general the most important part of the Third Party Review, as with all our assessments, is time and gaining the clients trust that we will do a good job. The rest of this assessment is consistent with the previous other two evaluations we conduct. Meeting with the client to go over the results in clear language that is meaningful.

- **Summary of features of our proposal:**

- Additional Vendor Responsibilities: Brain Learning welcomes all opportunities to train and present to staff about disability, speak directly with participants on benefits of evaluation and create a video to incorporate into the orientation for new clients. These additional responsibilities are at no cost to Fresno County.

- Brain Learning currently employs four bi-lingual educational psychologists. Evaluations in Spanish are billed at the same cost as English evaluations.
- Brain Learning Psychologists have experience working with children and often help our clients navigate through the public school system during the evaluation process. Because Learning Disabilities are a Biological condition, oftentimes our client's children struggle with similar problems in school.
- Another feature of the work we do is the options our clients have to participate in the assessment process. Since April 2020, Brain Learning has been successfully conducting remote assessments via Zoom platform. This option has allowed us to reach more of our clients than ever before.

**b.ii. Scope of Work:**

**1. SERVICES:**

● **Process for Scheduling Participants:**

- Our assessment process begins with a psychologist reviewing all information provided by the county about the client. A phone call is made where we outline the process to the client. At this moment, we carefully explain the benefits of the evaluation to the client. We answer the clients' questions and then proceed to gather information and availability for in-person or remote testing. When our office does not reach a client, we leave a voicemail message and follow up with a text message letting them know about the voicemail. We have found that many clients no longer check voicemail messages or answer calls from unknown numbers. Clients are more likely to return a call if they have received a text.

● **Time Between initial referral and Contact:**

- When Brain Learning receives a referral, they will call the client to schedule within two business days. When a client is available to schedule for testing, Brain Learning will have available appointment dates within seven days.

- **Strategies for contacting Participants:**

- At times, clients are hard to reach. We find that our system of reaching out via a phone call, followed up by a text is the best way to reach a client:
- Brain Learning reaches out to each new-referred client within two business days from referral and every two business days thereafter if they do not have direct contact with a client. Brain Learning defines direct contact as: speaking to a client over the phone or receiving a reply to our text message.
- If four business days have passed without making direct contact- Brain Learning will call, text and email the client (if an email is included in the referral packet).
- If 6 business days have passed without making direct contact, Brain Learning reaches out to the referring employment case manager to inquire if they may have an alternate number for the client and to see if they have had contact with the client recently.
- If for some reason the provided contact information is not valid ie: phone not accepting calls/ texts, no email provided or bounce back on email Brain Learning will reach out to employment case manager directly.

- **Average assessment timeframe:**

- The average assessment can be completed within 10 days of the testing date.
- One testing appointment (3-4 hours) testing and clinical interview. Report will be ready within 7 business days from testing appointment completion. Results review meeting via video conference or 3 way phone call with educational psychologist, client and employment case manager (ECM).

- **Number of Assessments per month:**

- Our office could conduct 80 LDE and LEP evaluations per month with our current staff. Dr. Rienzi Haytasingh through his time in the field of psychology as an educator and mentor has developed relationships with many part-time school psychologists throughout the State of California. He has mindfully cultivated a resource of school psychologists who are

passionate about learning disabilities and are interested in conducting evaluations as a part of the Brain Learning Team. Due to this resource, Brain Learning is able to increase our potential number of LDE and LEP evaluations to meet the demand of our current and future partnered counties.

- **Proposed service schedule:**

- Brain Learning is available to perform LDE and LEP evaluations M-F 8 am.- 5 pm and evenings and weekends as needed.
- Results meetings with psychologist, client and ECM during county normal business hours and tailored to days/ time frame that work best for ECM and client.

- **Proposed Locations(s) of the proposed service site(s):**

- a. Brain Learning proposes to provide in person testing in our own offices at central sites to Metro Fresno at: 1444 Fulton St, Fresno, CA 93721 and 5588 N Palm Ave #1957, Fresno, CA 93704. These offices are currently available. Brain Learning also offers to test clients in rural and central Fresno remotely using secure video conferencing if clients have reliable internet and a computer with a camera and remote testing benefits the clients. Brain Learning can also provide rural evaluations for clients with limited access to internet via the DSS rural locations in-person and remotely utilizing either Brain Learning provided secure laptop with camera or Fresno DSS provided computer if preferred by Fresno DSS.
- b. Both of the physical Central Metro offices are within a block of public transportation stops and deemed appropriate for a quiet, secure testing space.
- c. Having a variety of testing locations, and options utilizing secure video conferencing allow us to reduce barriers to clients accessing the LDE and LEP evaluations.

- **Optional Additional Requested Services:**

- a. Training Staff:**

One of the aspects of Brain Learning that make us unique is our commitment to go beyond the evaluation process. We have learned that providing ongoing training and educational opportunities on the culture of disabilities at no cost is of great value to our current partners. Dr. Haytasingh regularly conducts disability education training to social workers and case managers and regularly trains new employees who have responsibilities relevant to this process.

- b. Presenting to Participants**

Brain Learning considers the opportunity to be able to speak to participants directly about LDE evaluations and its benefits as a gift. According to the National Center of Learning Disability, In 2020, only 17.9% of people with a disability were employed, compared to 61.8% of people without a disability. The unemployed population is disproportionately affected by disability. Many participants in CalWORKS have either had their disability missed by their educational system entirely or not been educated about their disability. Not educating people about their disability leaves them unable to advocate for their needs in adulthood. Only 17% of college students identified with learning disabilities utilize their disability support services at their universities. Many participants have grown up with a stigma associated with disability or feelings of unworth due to their struggles through education. Brain Learning believes in empowering all people based on their strengths and helping people seek accommodations for their weaknesses. Information about oneself is powerful. Clients whose learning disabilities are appropriately identified are more likely to be successful in the CalWORKS program and more likely to be successful in employment.

- c. Client Orientation Video:**

Brain Learning has sat in on in-person orientations throughout our partnered San Diego County Locations. By personally being a part of these orientations, we recognize that there is an abundance of information shared through the orientation process. At times, the amount of paperwork and guidelines can be

overwhelming and possibly not accessible to a participant with a disability. We believe that a video about the LDE opportunity and what to expect would encourage participants to be willing to pursue the evaluation if they feel it would be beneficial for them. We would be happy to provide this video and happy to collaborate with Fresno County on the guidelines of it.

- **Implementation Timeline:**

Assuming the contract execution date is by November, 22, 2022, Brain Learning will adhere to the following timeline:

By December 1, 2022:

- Meet with Fresno County to develop protocol specific to Fresno County's preferences and needs for LDE and LEP referrals.
- Meet with Fresno County Departments to collaborate on specific needs for Orientation Video.

By December 15, 2022:

- Sign lease for office space at proposed offices in Central Metro Fresno
- Train our staff of specific protocols for Fresno County, referral and scheduling
- Schedule first informal training presentation for DSS Staff, training materials will be provided to administrators ahead of time for approval.
- Schedule January and February ongoing informational presentations for participants twice a month.

By January 1, 2023:

- Provide Orientation Video to be reviewed and approved by Fresno County.
- Available to accept referrals and schedule clients.

\* Brain Learning will be able to move all aspects of the timeline up if the contract is executed and if the County is available.

**2. ORGANIZATION AND STAFF QUALIFICATIONS:**

Brain Learning conducted its first CalWORKS Learning Disability Evaluation in January of 2019. Since January of 2019 we have conducted over 417 Learning Disability Evaluations collectively for the three counties we serve. 60 of these evaluations have been conducted in Spanish. Additionally, we have provided the LDE assessment to participants who speak Chaldean, Arabic, Hatian Creole, Persian, and Swahili, with use of a language translator.

**a. Psychologists:**

Brain Learning currently employs seven educational psychologists including Dr. Rienzi Haytasingh. Brain Learning Educational Psychologists have a minimum of a Masters Degree in School Psychology with a PPS credential. Each of our evaluators have also worked in the K-12 school system and have assessed countless students for learning disabilities.

**b. Fiscal Staff:**

Our Accounting Manager has over ten years bookkeeping experience, an Associates degree in Science, Business Administration with Honors, Associate in Arts University Studies- Business & Economics with Honors, Associate in Arts Economics with Honors, and is HIPAA certified. She collects and maintains data for each of our current partnered counties.

Below is a grid of our current Brain Learning Psychologists, their credentials, licenses, their number of years assessing and if they are Bi-Lingual in English and Spanish.

Staff Name	Principal or Bi-Lingual Psych	Doctorate in School Psychology	School Psychology PPS Credential	Nationally Certified School Psychologist (NCSPT)	ABSNP (Neuropsych)	Licensed Educational Psychologis (LEP)	# of Years experience
<b>Dr. Rienzi Haytasingh</b>	<i>Principal Supervisor</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<b>20</b>
<b>Karen Veinbergs</b>	<b>Bi-Lingual</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<b>19</b>
<b>Dr. Jason Degtyarev</b>	<b>Bi-Lingual</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<b>16</b>
<b>Krushenka Salazar</b>	<b>Bi-Lingual</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>8</b>
<b>Melissa Silva</b>	<b>Bi-Lingual</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>4</b>
<b>Lizzy Guedry</b>	<b>English</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<b>10</b>
<b>Suzanne Pickell</b>	<b>English</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>8</b>

- Dr. Rienzi Haytasingh is the Principal Evaluator for Brain Learning. He reviews and staffs each case with the Brain Learning Psychologist for all cases he does not personally assess.
- Erin Haytasingh is the director at Brain Learning and she oversees administrative scheduling processes, data collection, and fiscal departments and contracts.
- **Brain Learning Ensures Cultural and/or Linguistic Sensitivity is included in all aspects of program planning and service delivery:**

Through our educational experiences and professional experiences, we have gained precious knowledge about the unique and not so unique challenges and differences our clients face. Our Educational Psychologists understand the biological, cultural, and social influences on academic skills; human learning, cognitive, and developmental processes. Brain Learning Educational Psychologists acknowledge and respect diversity in family systems. We identify varying world views, cultural and family contexts, and other factors that have an impact on family–school partnerships and interactions with community providers, and they consider these factors when developing and providing services for families.

### **3. DOCUMENTATION AND RECORD KEEPING:**

#### **a. Documenting participant assessment outcomes:**

##### **Reports:**

Brain Learning provides an evaluation report regardless of outcome for each participant evaluated. If a participant qualifies for a learning disability, Brain Learning also provides a diagnostic and accommodations report that removes the personal background information of a participant so that participants have disability verification to share with requesting parties. Brain Learning provides these reports to the client and ECM.

##### **Data:**

Brain Learning keeps data using secure sheets for all participants' referral dates, status and evaluation outcome. The data fields can be customized to individual

county needs. Files are maintained with records of all communication and attempted communication per participant.

26-19 Brain Learning completes and submits the 26-19 for one of our partnered counties.

**b. Responsible party of documentation:**

Our accounting manager tracks and maintains our data sheets. Reportable to Erin Haytasingh, Director Brain Learning.

**c. Time Allocation**

Brain Learning currently spends approximately five hours per week on data tracking and management collectively for our four partnered sites.

**4. Describe your agency's ability to:**

**a. Maintain and secure confidential records:**

For all of our records, Brain Learning uses double locked files and maintains records for 10 years from assessment date.

**b. Collect data consistently:**

Brain Learning collects and maintains consistent accurate data for all of our current partnered clients. We can modify the data fields as requested by our partnered counties.

**c. Track qualitative and quantitative outcomes:**

Brain Learning keeps data on referral numbers, status, language, referring site, referring ECM, and outcomes. We keep both quantitative and qualitative data on no shows and referred clients who are no longer interested or no longer in CalWORKS.

**5. Describe your agency's planned method to securely provide DSS with:**

**a. Monthly activity reports:**

Brain Learning provides data to each partnered county on a monthly basis and can provide it with more frequency as needed.

**b. Monthly invoices:**

Brain Learning provides monthly billing for two partners and twice monthly for two partners currently. We are happy to invoice monthly or more frequently as requested by Fresno County. Invoices are sent securely through Quickbooks software.

**c. Participant assessment reports:**

Are sent electronically through password protected documents individually upon completion of assessment. At times, when requested as a part of an audit of invoice they are provided securely in bulk in relation to the specific invoice.

**c. Sample Reports:**

See Exhibit B at the end for:

- Sample LDE Report
- Sample LEP Report

**d. Alternative Solutions or Approaches:**

At Brain Learning we have met our clients in additional private testing places such as Public Library meeting rooms to conduct evaluations when access to computers or rural county offices are not available. Brain Learning is collaborative and flexible and will work with Fresno County in order to best serve its participants.

**Exhibit A: Cost Proposal**

Bidder or Company Name:

Brain Learning Psychological Corp

Reminder: As stated in the cost proposal requirements of this RFP, both Sections I and II must be completed.

Section I: Proposed Cost Per Instance of Service - The fees below should cover your agency's operational costs for the services. Underlined quantities can be guaranteed. Italicized quantities are estimates based on current trends, and actual quantities may be higher or lower.

Fee-for-Service Items 7-9 are desired, but optional. If your agency prefers to not offer the service, please enter the price as \$0.00 and explain in the budget narrative in Section II below.

Fee-for-Service Proposed Rates by Service	Est. Qty. Needed per 12 Months (actual demand will fluctuate)	Term 1 (18 months) January 1, 2023 – June 30, 2024	Optional Term 2 (12 months) July 1, 2024 – June 30, 2025	Optional Term 3 (12 months) July 1, 2025 – June 30, 2026	Optional Term 4 (12 months) July 1, 2026 – June 30, 2027
		Cost per Service	Cost per Service	Cost per Service	Cost per Service
1. Limited English Proficiency (LEP) Report	75	\$ 1,300.00	\$ 1,400.00	\$ 1,400.00	\$ 1,500.00
2. Learning Disability Evaluation (LDE) Report	65	\$ 1,300.00	\$ 1,400.00	\$ 1,400.00	\$ 1,500.00
3. Independent Assessment (Third Party Review) Report	2	\$ 250.00	\$ 300.00	\$ 300.00	\$ 350.00
4. Interpreter Services (per minute rate)	1,600	\$ 4.00	\$ 4.00	\$ 4.00	\$ 4.00
5. Monthly Activities: Prepare Monthly Invoice/Reports, Ongoing Communication with DSS (limit 12 per year)	12	\$ -	\$ -	\$ -	\$ -
6. No-Shows/Cancellations (zero cost preferred)	120	\$ -	\$ -	\$ -	\$ -
7. Produce New or Update WTW Client Orientation Video	1	\$ -	\$ -	\$ -	\$ -
8. Informational Training Presentations for DSS Staff	5	\$ -	\$ -	\$ -	\$ -
9. JobWISE Presentations	24	\$ -	\$ -	\$ -	\$ -
ESTIMATED TERM COST (for comparison purposes only)		\$ 283,350.00	\$ 203,000.00	\$ 203,000.00	\$ 217,100.00
EST. ACCUMULATED TOTAL COST (INCLUDING OPTIONAL TERMS) (for comparison purposes only)		\$ 283,350.00	\$ 486,350.00	\$ 689,350.00	\$ 906,450.00

**Exhibit A: Cost Proposal**

Bidder or Company Name:

Brain Learning Psychological Corp

**Section II. Budget Narrative - Include a brief narrative that explains and justifies the cost per instance of service and any price increases.**

<p><b>1. Limited English Proficiency (LEP) Report:</b>                  LEP FOR SPANISH Charged Flat rate of \$1300 for first term. \$100 cost increase every 2 years.                  LEP FOR LANGUAGES OTHER THAN SPANISH OR ENGLISH                  Charged Flat rate of \$1000 for first term. \$100 cost increase every 2 years. (SEE PAGE 3 OF COST BREAKDOWN FOR ESTIMATED DETAILS)</p>
<p><b>2. Learning Disability Evaluation (LDE) Report:</b>                  LDE SPANISH &amp; LDE ENGLISH                  Charged Flat rate of \$1300 for first term. \$100 cost increase every 2 years. (SEE PAGE 3 OF COST BREAKDOWN FOR ESTIMATED DETAILS)</p>
<p><b>3. Independent Assessment (Third Party Review) Report:</b>                  Charged Flat rate of \$250 for first term. \$50 cost increase every 2 years. (SEE PAGE 3 OF COST BREAKDOWN FOR ESTIMATED DETAILS)</p>
<p><b>4. Interpreter Services (per minute rate):</b>                  \$4 per minute for languages other than spanish or english</p>
<p>5. Monthly Activities (reimbursement is limited to 1 instance of service per month) - Prepare Monthly Invoice/Activity Reports, Ongoing Communication with DSS including contract monitoring meetings, calls, and emails pertaining to service delivery, invoicing, and monthly activity reports:  <b>PROVIDED WITH NO ADDITIONAL COST</b></p>
<p><b>6. No-Shows/Cancellations (zero cost preferred):</b>                  ZERO COST</p>
<p>7. Produce New or Update WTW Client Orientation Video:  <b>PROVIDED WITH NO ADDITIONAL COST</b></p>
<p>8. Informational Training Presentations for DSS Staff:  <b>PROVIDED WITH NO ADDITIONAL COST</b></p>
<p>9. JobWISE Presentations:  <b>PROVIDED WITH NO ADDITIONAL COST</b></p>

**Exhibit A: Cost Proposal**

Bidder or Company Name: Brain Learning Psychological Corp

Total Cost Per Evaluation Not to Exceed:	LEP	LEP/LDE	LDE	TPR	LEP	LEP/LDE	LDE	TPR	LEP	LEP/LDE	LDE	TPR
	OTHER LANGUAGE	SPANISH	ENGLISH		OTHER LANGUAGE	SPANISH	ENGLISH		OTHER LANGUAGE	SPANISH	ENGLISH	
	\$1,000.00	\$1,300.00	\$1,300.00	\$250.00	\$1,100.00	\$1,400.00	\$1,400.00	\$300.00	\$1,200.00	\$1,500.00	\$1,500.00	\$350.00
<b>Breakdown of Costs Per Evaluation</b>	01/01/23-06/30/24 (18 MOS)				07/01/24-06/30/25 (12 MOS) & 07/01/25-06/30/26 (12 MOS)				07/01/26-06/30/27 (12 MOS)			
<b>Assessor Cost</b>												
Assessor cost: Employee Piece wage, medical insurance, employer related insurance coverage, employer tax for case												
Hour Breakdown LEP Spanish OR OTHER LANGUAGE: 3-4 Hours for assessment, 2-3 Hours report writing, 30 min assessment review meeting	\$770.00				\$840.00				\$900.00			
Hour Breakdown LDE/LEP SPANISH: Spanish Speaking Assessor, 4-5 Hours for assessment, 2-3 Hours report writing, 30 min assessment review meeting		\$900.00				\$970.00				\$1,040.00		
Hour Breakdown LDE English: 3-4 Hours for assessment, 2-3 Hours report writing, 30 min assessment review meeting			\$1,000.00				\$1,070.00				\$1,140.00	
Hour Breakdown Third Party Review: 1-2 Hours data review, 0.5-1 hour review meeting				\$220.00				\$260.00				\$300.00
<b>Direct Cost</b>	\$80.00	\$205.00	\$105.00	\$0.00	\$95.00	\$220.00	\$120.00	\$0.00	\$110.00	\$235.00	\$135.00	\$0.00
Office supplies: printing supplies, file materials, mailing	10.00	15.00	15.00	0.00	13.00	18.00	18.00	0.00	16.00	20.00	20.00	0.00
Testing Materials: Protocols- Paper and digital	5.00	18.00	18.00	0.00	7.00	20.00	20.00	0.00	9.00	23.00	23.00	0.00
Computer: Laptop usage for each assessment	20.00	22.00	22.00	0.00	20.00	22.00	22.00	0.00	20.00	22.00	22.00	0.00
Office rent: Rental of testing space, utilities, business insurance	45.00	50.00	50.00	0.00	55.00	60.00	60.00	0.00	65.00	70.00	70.00	0.00
Spanish Services: spanish speaking assessor premium, spanish testing material additional costs		100.00	0.00	0.00		100.00	0.00	0.00		100.00	0.00	0.00
Interpreter Services: Charged at \$4 per minute, for languages other than English and Spanish, charged seperately												
<b>Indirect Cost</b>	\$150.00	\$195.00	\$195.00	\$30.00	\$165.00	\$210.00	\$210.00	\$40.00	\$190.00	\$225.00	\$225.00	\$50.00
Administration: Office administration, scheduling, project preparation and material gathering, data collection	100.00	130.00	130.00	20.00	110.00	140.00	140.00	25.00	125.00	150.00	150.00	30.00
Billing: contract preparation, billing appropriately per case, budget compliance and review	50.00	65.00	65.00	10.00	55.00	70.00	70.00	15.00	65.00	75.00	75.00	20.00
<b>Total Cost per Evaluation</b>	\$1,000.00	\$1,300.00	\$1,300.00	\$250.00	\$1,100.00	\$1,400.00	\$1,400.00	\$300.00	\$1,200.00	\$1,500.00	\$1,500.00	\$350.00
<b>Amount of Cases Expected</b>	15	98	98	2	10	65	65	2	10	65	65	2

## CHECK LIST

This Checklist is provided to assist vendors in the preparation of their RFP response. Included are important requirements the bidder is responsible to submit with the RFP package in order to make the RFP compliant.

Check off each of the following (if applicable):

- Signed cover page of Request for Proposal (RFP).
- Check <http://www.FresnoCountyCA.gov/departments/internal-services/purchasing/bid-opportunities> for any addenda.
- Signed cover page of each Addendum.
- Provide a Conflict of Interest Statement.
- Signed *Trade Secret Form* as provided with this RFP (Trade Secret Information, if provided, must be electronically submitted in a separate PDF file and marked as Confidential).
- Signed *Criminal History Disclosure Form* as provided with this RFP.
- Signed *Participation Form* as provided with this RFP.
- The completed *Reference List* as provided with this RFP.
- Indicate all of bidder exceptions to the County's requirements, conditions and specifications as stated within this RFP.
- Bidder's proposal, in PDF format, electronically submitted to the Bid Page on Public Purchase.

**Return Checklist with your RFP response**

PH: (619) 324-9764  
 FAX: (619) 713-5870  
 OFFICE@BRAINLEARNING.COM



Brain Learning  
 CalWORKS  
 Diagnostics

LOCATIONS  
 SAN DIEGO COUNTY  
 LAKE COUNTY  
 SONOMA COUNTY

CalWorks-Brain Learning  
[www.meaningfuldiagnostics.com](http://www.meaningfuldiagnostics.com)

\*Note: This is a sample report: Identifying information has been altered to maintain client confidentiality.

*"THE BEGINNING OF SUCCESS IS TO KNOW ONESELF."*

### LEARNING DISABILITY ASSESSMENT- CALWORKS

#### CONFIDENTIAL

This evaluation report contains confidential and sensitive information, and any unauthorized distribution or disclosure is prohibited.

#### CLIENT IDENTIFYING INFORMATION

Name	Rosie Gonzales	Date of Testing	08/09/2022
Age	19	Handedness	Right
Primary Language	English	Date of Report	08/17/2022
IEP History	Yes		
D.O.B.	10/02/2002	Date of Report	8/13/2022

#### REASON FOR REFERRAL

Rosie was referred for a Learning Disability Assessment (LDA) because of the need for information to help determine cognitive strengths and weaknesses, academic skill level, and vocational/personality strengths and weaknesses. This information will be used to help the client reenter the workforce at a future time. Rosie was able to participate in testing with the examiner at the Brain Learning office in La Mesa, CA. Testing took approximately 3 hours.

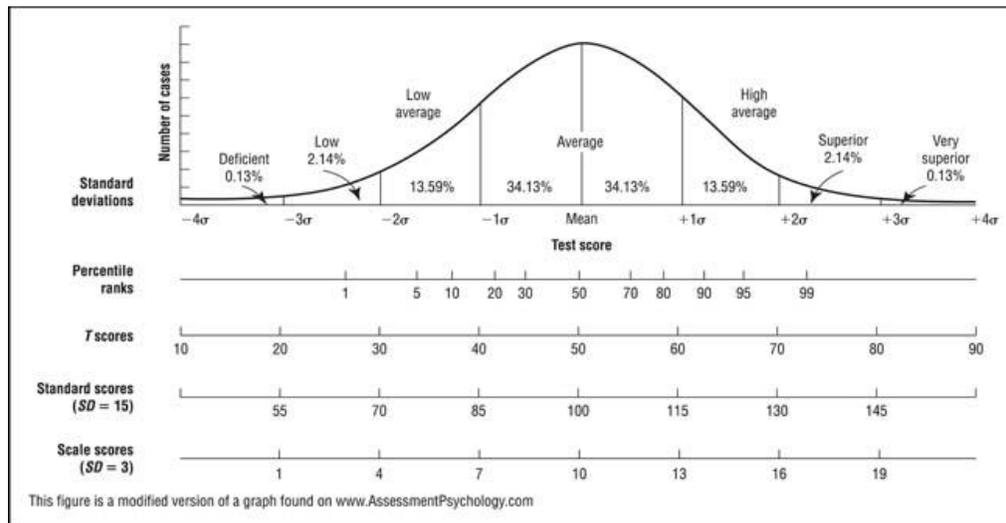
GONZALES, ROSIE  
DOB: 10/2/2002

2

## ASSESSMENT PROCEDURES

The assessment materials and procedures used during this evaluation were selected and administered so as not to be racially, culturally, or sexually discriminatory. The effects of environmental, cultural, or economic disadvantage were considered in selection and administration of the instruments used. These materials and procedures were administered in the client's primary or language of fluency and have been validated for the specific purpose for which they were used. The assessments were completed in compartment with the publisher of the assessment materials by a qualified examiner. With the exception of informal/alternative assessments, this evaluation used standardized instruments that represent a comparative match of the normal population of this student. Results of standardized tests were used diagnostically in combination with non-standardized assessment procedures to appropriately assess this client's performance and no single procedure was used as the sole criterion for determining eligibility, unique need, or educational recommendations. Unless otherwise stated, this evaluation is considered a valid reflection of Rosie's current level of functioning.

## DESCRIPTION OF EVALUATION TERMS



PERCENTILE RANK scores tell you how many individuals performed higher than you (when compared to the same peer group). For example, if you scored within the 50<sup>th</sup> percentile, it means that you scored as well or better than 50% (or half) of individuals who are the same age, grade, and/or gender.

T SCORES have an average of 50 and a range of 1-100. T-scores between 40-60 are considered to fall within the average range of functioning.

STANDARD SCORES have an average of 100 and a range of 40-160. Standard scores of 85-115 are considered to fall within the statistically average range of functioning.

SCALE SCORES have an average of 10 and a range of 1-19. Scale scores of 7-13 are considered to fall within the average range of functioning.

GONZALES, ROSIE  
DOB: 10/2/2002

3

### CURRENT ASSESSMENT INSTRUMENTS/MEASURES

Review of records including health, developmental, and relevant medical information was included in this assessment. Testing behavioral observations were completed during the testing dates and are noted herein.

Informal Measures	Assessment Dates
Client Interview	08/09/2022
Review of Relevant records	
Testing Observations	

Cognition and Processing Measures	Assessment Dates
Wechsler Adult Intelligence Scales, 4 <sup>th</sup> Edition (WAIS-IV)	08/09/2022
The WAIS-IV is an individually administered clinical instrument designed to assess the cognitive ability and problem-solving processes of individuals ages 16:0-90:1.	

Academic Achievement Measures	Assessment Dates
Wechsler Individual Achievement Test, 4 <sup>th</sup> Edition (WIAT-IV)	08/09/2022
The WIAT-4 is an individually administered test that evaluates academic achievement in reading, math, and writing, and oral language (expressive and receptive).	

Vocational/Personality/Strengths Interest Testing	Assessment Dates
Truity- Vocational and Personality Testing	08/09/2022
The Truity Career Personality Profiler is a comprehensive, scientifically validated career test that measures both your interests and your personality traits so you can find the right career for you.	
<b>Sokanu Career Test</b>	
Sokanu is a career matching platform that helps people find their ideal career. Sokanu accomplishes this in two ways. The first is through the world's best career test — a prediction engine built from the ground up using the latest innovations in psychometrics and machine learning. The second is through Sokanu's 750 career profiles, containing thousands of pieces of unique content aimed at helping people understand and enter careers.	

### BACKGROUND INFORMATION (HISTORY AND REVIEW OF RECORDS)

Rosie participated in testing in person at the examiner's office. She was born in San Diego, lived with her mom and other members of her family. Growing up, she went to approximately 7 different schools. She reported that it wasn't easy for her to make such moves. She attended high school at a Point Loma and San Diego Charter but dropped out when she was in 9<sup>th</sup> grade. Rosie started working at Harbor House from the time she was in High School until they closed due to COVID-19. She recalled enjoying working with and helping people as well as staying busy. Rosie has one child turning one very soon, and currently she and her son live at home with her mother. She reported that living at home is not easy, but she knows it's the right thing for her child and herself. Rosie shared that she has always had an interest in jewelry making and her dream would one day be to make and sell her own jewelry. Rosie discussed an interest in possibly attending higher education. This examiner asked her about going back to school to earn her GED and then to learn about rocks and stones. Rosie was open to this idea and even seemed interested in it. In her free time, she loves to sing and spend time with her son. She hopes to one day travel to Portugal with him and show him where her family is from. Lastly, Rosie reported that she has always struggled in math and one of

GONZALES, ROSIE  
DOB: 10/2/2002

4

her schools attempted to support her through the RSP or special education program, but then she moved. Because of the moves, the individualized educational plan could not always be followed with fidelity. Rosie has always been nervous about math. She reported that she was never good at math, but did not understand why. She also reported that she struggled to pass math tests.

### TESTING BEHAVIOR

#### Communication

Rosie participated in appropriate social dialogue. She engaged in normal small talk and initiated conversation in order to connect with the examiner. Rosie's language articulation, speech productivity, and speech manner were normal.

Rosie's communication was not impeded in any way and he demonstrated satisfactory and receptiveness. Auditory comprehension was adequate and oral delivery was effective. Rosie's speech was without articulatory deficit. Her comprehension of English was normal and she did not need have to have instructions rephrased, simplified, or repeated.

#### Interpersonal

Rapport was easily established with the examiner. Rosie's interpersonal skills during testing could be described as friendly, cooperative, and laid-back. She was nervous at times, when she was asked to perform math tests.

#### Attention

During testing, Rosie's attention behavior could be described as attentive and alert. She could focus on and select the relevant information from among the irrelevant aspects of a situation and could maintain the focus and resist distraction. Rosie's attention was sufficient for responding to questions.

#### Cognitive

Rosie's cognitive functioning could be described as stable. She did not dwell on past failures and incorrect responses, and he appeared to be feigning good spirit.

#### Emotional

Rosie's emotional functioning during testing could be described as self-confident, humorous, and sincere.

#### Problem solving

Rosie's problem-solving skills could be described as normal. She did not have difficulty with concept formation, judgement, abstraction, opposites/similarities/differences, comparative analogies, and/or absurdities. Rosie had common-sense and a functional

understanding of everyday objects. She was able to form concepts well, and handled ideas well and without concreteness.

### COGNITIVE/APTITUDES INFORMATION PROCESSING

GONZALES, ROSIE  
DOB: 10/2/2002

5

### Language Processing

Ta is your knowledge of word meaning and your ability to communicate verbally.

Measure: Composite/Subtest	Score	PR	Classification
<b>WAIS-IV Similarities:</b> Describing how two words that represent common objects or concepts are similar.	10	50	At Expected
<b>WAIS-IV Vocabulary:</b> Ability to name pictured objects or define word meanings.	10	50	At Expected
<b>WAIS-IV Information</b>	9	37	At Expected

### Visual Processing

Visual processing is a term that is used to refer to the brain's ability to use and interpret visual information from the world around us.

Measure: Composite/Subtest	Score	PR	Classification
<b>WAIS-IV Block Design:</b> Re-creation of a constructed model or a picture of a block design within a specified time limit.	7	16	Slightly Below Expected
<b>WAIS-IV Matrix Reasoning:</b> Completing a missing portion of a picture matrix.	6	9	Slightly Below Expected
<b>WAIS-IV Visual Puzzles:</b> Identify two or more pieces that go together to form a complete target shape.	5	5	Below Expected
<b>WAIS-IV Figure Weights:</b> Determine the missing weight(s) on a scale and select the response option that keeps the scale balanced.	5	5	Below Expected

### Memory Processing

Memory is the ability to acquire, store, and retrieve information. This is how well how can remember information in "short-term" memory, rather than long term memory.

Measure: Composite/Subtest	Score	PR	Classification
<b>WAIS-IV Digit Span:</b> Repeating auditorily presented digits of increasing length.	9	37	At Expected
<b>WAIS-IV Arithmetic</b> Mentally solve a series of arithmetic problems in a specified time limit	5	5	Below Expected
<b>WAIS-IV Letter-Number Sequencing</b> Read a sequence of numbers and letters and recall the numbers in ascending order and the letters in alphabetical order.	6	9	Slightly Below Expected

### Attention Processing/Speed of Processing

These tests look at your ability to focus your attention and processing visual information quickly.

Measure: Composite/Subtest	Score	PR	Classification
<b>WAIS-IV Coding:</b> Symbols that are paired with simple geometric shapes or numbers are copied within a specified time limit.	10	50	At Expected
<b>WAIS-IV Symbol Search:</b> Visual scanning a group of stimuli to match target symbols.	9	37	At Expected
<b>WAIS-IV Cancellation:</b> Marking target pictures within a visual set of pictures in a specified time-period.	11	63	At Expected

GONZALES, ROSIE  
DOB: 10/2/2002

6

WAIS-IV Composites			
Measure: Composite/Subtest	Score	PR	Classification
Verbal Comprehension Subtests: Similarities, Vocabulary, Information	98	45	At Expected
Perceptual Reasoning Subtest: Block Design, Matrix Reasoning, Visual Puzzles	77	6	Below Expected
Working Memory Subtest: Digit Span, Arithmetic	83	13	Slightly Below Expected
Processing Speed Subtest: Coding, Symbol Search	100	50	At Expected

### ACHIEVEMENT

Reading Comprehension/Fluency			
<u>Reading Comprehension</u> is the ability to comprehend written discourse. <u>Reading fluency</u> includes the rate and accuracy of one's reading ability.			
Measure: Composite/Subtest	Score	PR	Classification
WIAT-4 Oral Reading Fluency Reading passages aloud and then orally responds to comprehension questions	118	88	Above Expected
WIAT-4 Reading Comprehension Reading passages out loud or silently under non-timed condition. Then answering open ended questions about the passages.	100	50	At Expected

Written Expression			
<u>Written language</u> includes the breadth and depth of an individual's acquired store of declarative and procedural writing skill. Specifically, writing ability is the communication of information and ideas in written form so that others can understand (with clarity of thought, organization, and good sentence structure). It is a broad ability that involves a number of other writing sub-skills (e.g. knowledge of grammar, the meaning of words, and how to organize sentences or paragraphs).			
Measure: Composite/Subtest	Score	PR	Classification
WIAT-4 Essay Composition: Theme Development & Text Organization	80	9	Slightly Below Expected

Mathematical Calculation, Reasoning Results, & Fluency			
<u>Mathematical calculation</u> is the ability to solve math problems using computational skills. <u>Mathematical reasoning</u> is the ability to analyze and solve math problems. <u>Mathematical fluency</u> includes the rate and accuracy of mathematical information expressed.			
Measure: Composite/Subtest	Score	PR	Classification
WIAT-4 Numerical Operations:	68	2	Below Expected

GONZALES, ROSIE  
DOB: 10/2/2002

7

Performing a variety of math calculations  
WIAT-4 Math Problem Solving  
Application of real world math problems

77

6

Below Expected

## VOCATIONAL INTERESTS/PERSONALITY FUNCTIONING

### Truity Vocational Testing

The Truity Career Personality Profiler is a comprehensive, scientifically validated career test that measures both your interests and your personality traits so you can find the right career for you.

### Section I: Your Career Type

This section describes your top interest area.



### You're a Creator

Your primary interest area is Artistic, which means you are a creator interested in imagination, self-expression, and artistic experience. Creators enjoy drama, fine arts, music, and creative writing. They like to work with visual elements such as forms, colors, and patterns.

Creators like an unstructured work environment where they can be free to express their individuality. They usually like to avoid work settings with a lot of strict rules or standard procedures that must be followed.

GONZALES, ROSIE  
DOB: 10/2/2002

8

Creators like their work best when they can think outside the box and put their own personal spin on what they do. As a Creator, your primary career goal will be to find a job where you can use your imagination and solve creative problems in a unique and original way.

Some sample careers for Creators include graphic designer, musician, journalist, novelist, and architect.

## Section II: Your Score Summary

In this section, you will see how you scored for each of the 6 interest areas.



### Building

Building careers are those that involve mechanics and construction, working with machines, or using physical skills. Builders are often attracted to careers in the military or law enforcement, construction, mechanics, and athletics.

Your interest level for the Building career area is low.



### Thinking

GONZALES, ROSIE  
DOB: 10/2/2002

9

Thinking careers are those that involve research, analysis, and solving abstract or theoretical problems. Thinkers are often attracted to careers in the sciences, computers and technology, mathematics, and medicine.

Your interest level for the Thinking career area is moderate.



### Creating

Creating careers are those that involve artistic expression, imagination, and the creative use of language. Creators are often attracted to careers in performing or visual art, music, writing, and all areas of design.

Your interest level for the Creating career area is high.



### Helping

Helping careers are those that involve assisting, teaching, or taking care of other people. Helpers are often attracted to careers in education, counseling, health care, social service, and human resources.

Your interest level for the Helping career area is high.

GONZALES, ROSIE  
DOB: 10/2/2002

10



### Persuading

Persuading careers are those that involve leading, influencing, or managing others. Persuaders are often attracted to careers in business, management, sales, retail, and entrepreneurship.

Your interest level for the Persuading career area is moderate.



### Organizing

Organizing careers are those that involve managing data, files, and processes. Organizers are often attracted to careers in accounting, computers and information systems, administration, and office management.

Your interest level for the Organizing career area is low.

### **Career Explorer by Sokanue. Results for Gemologist.**

Sokanu is a career program that is state of the art in its algorithm process. Serving over 10 million people per year, Sokanue uses cutting-edge data science to help people discover their best-fit careers and give them the tools they need to make that career a reality.

GONZALES, ROSIE  
DOB: 10/2/2002

11

### What is a Gemologist?

Gemologists specialize in identifying, grading, and appraising gemstones. They can easily recognize a gemstone's variety and can identify and evaluate details that are not noticeable or visible to the human eye.



A gemologist is responsible for certifying, analyzing, and describing the characteristics and qualities of gemstones such as diamonds, sapphires, and rubies.

Gemologists use microscopes, computerized tools, and various grading instruments to examine gemstones or finished pieces of jewelry so as to certify their quality.

Due to a gemologist's wealth of knowledge, customers rely on them to carefully analyze and appraise their family heirlooms. They use special tools to evaluate color, size, and shape.

A gemologist can establish the origins of a gemstone during an evaluation, as well as categorize it based on specific gravity, refractive index, and crystal structure. A grading report assesses the quality of a gemstone's features such as color, clarity, and cut.

Gemologists keep an eye on investment markets and subscribe to industry journals and newsletters in order to give customers the best estimated value for their jewelry.

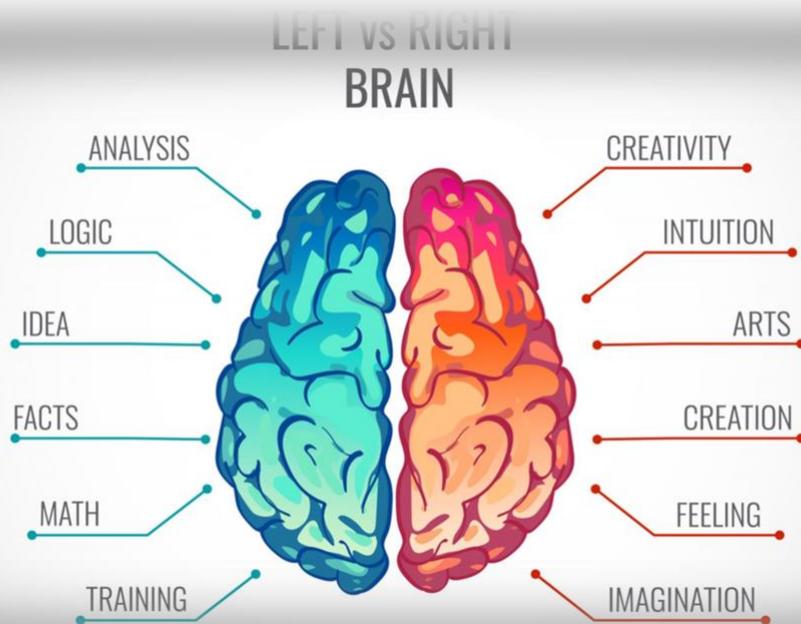
What is the workplace of a Gemologist like?

A gemologist can work as a diamond and gemstone buyer and merchandiser, a lab researcher and grader, an appraiser, a jewelry designer, an auction house or museum specialist, a jewelry photographer, a jewelry blogger, a lapidary artist, or an educator.

A gemologist working behind a jewelry counter might use their skills to sell merchandise, while someone working in a museum might use their expertise to value donations or potential purchases. At an auction house, gemologists can propose reserve amounts for jewelry, and in their own shop, they might write up a professional estimate for insurance purposes.

GONZALES, ROSIE  
DOB: 10/2/2002

12



### EVALUATION SUMMARY

Rosie participated in testing in person at the examiner's office. She was born in San Diego, lived with her mom and other members of her family. Growing up, she went to approximately 7 different schools. She attended high school at a Point Loma and San Diego Charter but dropped out when she was in 9<sup>th</sup> grade. Rosie started working at Harbor House from the time she was in High School until they closed due to COVID-19. The results of the current evaluation reflect that Rosie has strong cognitive skills. She has good verbal reasoning, memory skills, and attention skills. She has good reading and writing skills, but demonstrates a math disability. Her visual processing and fluid reasoning skills are a neurocognitive weakness for her. She reported to always having difficulties with math and this assessment confirms the presence of a math disability. Rosie can get around her disability, with proper knowledge and accommodations. She has stronger left brain processing than right brain processing.

On testing of vocational skills, Rosie reflected interests and strengths creating and helping people. Her primary interest area is Artistic, which means she is a creator interested in imagination, self-expression, and artistic experience. This lines up with what Rosie explained that she wanted to pursue for a future career. Creators enjoy drama, fine arts, music, and creative writing. They like to work with visual elements such as forms, colors, and patterns. Creators like an unstructured work environment where they can be free to express their individuality. They usually like to avoid work settings with a lot of strict rules or standard procedures that must be followed.

GONZALES, ROSIE  
DOB: 10/2/2002

13

Creators like their work best when they can think outside the box and put their own personal spin on what they do. As a Creator, your primary career goal will be to find a job where you can use your imagination and solve creative problems in a unique and original way. Some sample careers for Creators include graphic designer, musician, journalist, novelist, and architect.

***Rosie, you have a gift of knowing what will make you happy in a career choice. All your data lines up to that career you want to pursue. With enough belief in yourself, you will be able to pursue your career in Gemology.***

Geological engineers carry out technical studies to evaluate the physical landscapes where dams, mines, roads, railways, pipelines, forestry, and other operations that involve extracting natural resources are planned. They provide solutions related to land reclamation, air and water pollution, potential landslides and earthquakes, and environmental sustainability.

Students of geological engineering learn how to apply knowledge of earth materials and earth sciences to human problems and projects. Their areas of study span geology, chemistry, physics and mechanics, calculus, soil mechanics, solid mechanics, mineralogy, rock mechanics, landforms, groundwater hydrology, and engineering law and ethics.

#### DIAGNOSTIC IMPRESSIONS

Specific learning disorder

A neurodevelopmental disorder of biological origin manifested in learning difficulty and problems in acquiring academic skills markedly below age level and manifested in the early school years, lasting for at least 6 months; not attributed to intellectual disabilities, developmental disorders, or neurological or motor disorders

SLD

315.1 With impairment in mathematics

F 81.2 Math dysability

#### What Is Specific Learning Disorder?

Specific learning disorder (often referred to as learning disorder or learning disability, see note on terminology) is a neurodevelopmental disorder that begins during school-age, although may not be recognized until adulthood. Learning disabilities refers to ongoing problems in one of three areas, reading, writing and math, which are foundational to one's ability to learn.

GONZALES, ROSIE  
DOB: 10/2/2002

14

**Dyscalculia** is a term used to describe difficulties learning number related concepts or using the symbols and functions to perform math calculations. Problems with math can include difficulties with number sense, memorizing math facts, math calculations, math reasoning and math problem solving.

**Learning disorder can vary in severity:**

Moderate: Significant difficulties with learning, requiring some specialized teaching and some accommodations or supportive services

**RECOMMENDATIONS**

1. It is recommended that Rosie apply for adult school and obtain her GED with ADA accommodations. GED: The link below will take you to the website to apply and also obtain accommodations. <https://sdcce.edu/hsged>
2. It is recommended that Rosie begin conducting research into the Gemonology programs that are available to her. <https://www.gia.edu/gia-contact/form-confirm>
3. It is recommended that Rosie learn about all degree options for Gemonology.
4. Rosie, you should review this video about math disability: <https://youtu.be/GRJS-jeZ7Is>
5. Here is another video about an adult with a math disability. <https://youtu.be/C812IfWIXU0>

**Learning Disability Accommodations in College or Vocational Setting.**

Presentation, Response, Setting, and Timing/Scheduling are the four basic types of accommodations used during instruction and assessment:

- Presentation accommodations allow students to access instructional materials in ways that do not require them to read standard print presented in a standard visual format:
  - Presentation Accommodations—Instruction
    - Verbal instructions
    - Repetition of instructions
    - Text/Instructions in audio-format
    - Larger print
    - Fewer Items per page
- Visual prompts or cues (e.g., arrow pointing on page).
  - Highlighted text
- Alternative answer sheet
- Information in songs or poems (e.g., facts, definitions).

GONZALES, ROSIE  
DOB: 10/2/2002

15

- Presentation Accommodations—Assessment
  - Calculator
- Response accommodations allow Rosie alternatives for completion of activities, assignments, and tests. Students may be permitted to demonstrate their knowledge and skills in alternate ways, or to solve or organize their work using an electronic device or organizer.
  - Mark answers in test book instead of on separate answer sheet
  - Dictate to scribe or record oral responses on audio-recorder
  - Record oral responses on Livescribe pen
  - Point to response choices
  - Type (keyboard) response.
- Setting accommodations change the location in which a test or assignment is given or the conditions of the assessment setting.
  - Individual or small group
  - Reduce visual and/or auditory distractions (e.g., separate desk or location within classroom—“private office”)
  - Distraction-free setting (separate room)
  - Alternative furniture arrangement (e.g., facing front teacher for whole group lessons vs block of tables for small group work).

### Job Accommodations

**Job Problem: When you copy or calculate figures, you tend to reverse or confuse number sequences**

Possible accommodations:

- Say aloud each number as you write or type it to ensure that it is correct.
- Do calculations twice, checking to see if the answers are the same.
- Use a talking calculator.

**Job Problem: You have no inner sense of direction (you have been known to get lost in your own building)**

Possible accommodations:

- Use maps and keep copies handy, both at home and at work.
- Have directions written, highlighting significant changes in direction.
- Ask people to accompany you to unfamiliar places.
- Practice going from one place to another using maps and noting landmarks.
- Hang pictures or other items on walls in ways that make the left and right side different from each other.

**Job Problem: You are easily distracted, and you work in an open space**

Possible accommodations:

GONZALES, ROSIE  
DOB: 10/2/2002

16

- Ask to move your work area to a more enclosed space.
- Arrange to work at home.
- Request to work in a location that is away from noise and busy office traffic.
- Identify file rooms, private offices, storage rooms, and other enclosed spaces that might be used as alternative work spaces.
- Use a white noise machine (creates background noise that covers up other, ambient sounds).

**Job problem: You have short-term memory problems (details such as names and numbers tend to be easily forgotten)**

Possible accommodations:

- Use mnemonic devices to remember sets of information. For example, HOMES is the acronym for the names of the Great Lakes: Huron, Ontario, Michigan, Erie, Superior.
- Create charts (often called graphic organizers) that allow you to quickly find the information you want.
- Use web tools such as [Evernote](#) which allow you to copy and paste information from websites, create diagrams, record information, and add comments and tags to information that you find. You can send the material to your computer, cell phone, or handheld device and access it.
- Think about new information and try to associate new ideas with facts that are already familiar.
- Make good use of your computer software. Sometimes, well-designed menus and help features can assist you.
- Use a miniature tape recorder or voice organizer.
- Have co-workers check with you to be sure that you understand. Repeat back while they confirm.
- Obtain information ahead of time (such as a list of conference participants so you can review names and affiliations ahead of time).

**Job problem: You have difficulty learning a lot of information quickly in intensive training classes and conferences**

Possible accommodations:

- Ask for written materials ahead of time. If the request is refused, ask former students to loan you their materials.
- Sit in the front and/or center so you can more easily follow what is said.
- Ask former students to brief you on the training.
- Tape record for review. Get telephone numbers of co-trainees for later follow-up.

These ideas may help you think about effective accommodations. Always try to get along without the accommodation from time to time to see if you still need it. Remember Rosie, you can do the job as well as everyone else even though you are doing it in a different way. On many occasions, accommodations for people with learning disabilities have been adopted by other people in the office, raising productivity for everyone.

GONZALES, ROSIE  
DOB: 10/2/2002

17

Lastly, it was a privilege to work with Rosie throughout this evaluation.

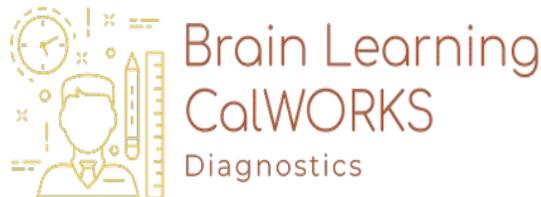


---

Rienzi Haytasingh, Psy.D., ABSNP  
Diplomate, American Board of School Neuropsychology  
Licensed Educational Psychologist  
California LEP # 2732

8/13/2022  
Date

PH: (619) 786-1329  
OFFICE@BRAINLEARNING.COM



LOCATIONS  
SAN DIEGO COUNTY  
LAKE COUNTY  
SONOMA COUNTY

CalWorks-Brain Learning  
[www.brainlearning.com](http://www.brainlearning.com)

\*Note: This is a sample report: Identifying information has been altered to maintain client confidentiality.

"THE BEGINNING OF SUCCESS IS TO KNOW ONESELF."

## LIMITED ENGLISH PROFICIENCY ASSESSMENT- CALWORKS

### **SAMPLE PROPOSED REPORT-FRESNO**

#### CONFIDENTIAL

This evaluation report contains confidential and sensitive information and any unauthorized distribution or disclosure is prohibited.

#### CLIENT IDENTIFYING INFORMATION

Name	Maria Sandoval	Date of Testing	
Age	28	Handedness	Right
Primary Language (reported)	Spanish/English	Date of Report	18/36/2021
IEP History	YES/NO		
Date of Birth	8/6/1994	Testing	In Person

#### REASON FOR REFERRAL

Maria was referred for a Limited English Proficiency (LEP) assessment because of the need for information to help determine English proficiency, academic skill level, and vocational/personality strengths and weaknesses. This information will be used to help Maria reenter the workforce at a future time. Maria was able to participate in testing with the examiner at the Brain Learning office in Fresno.

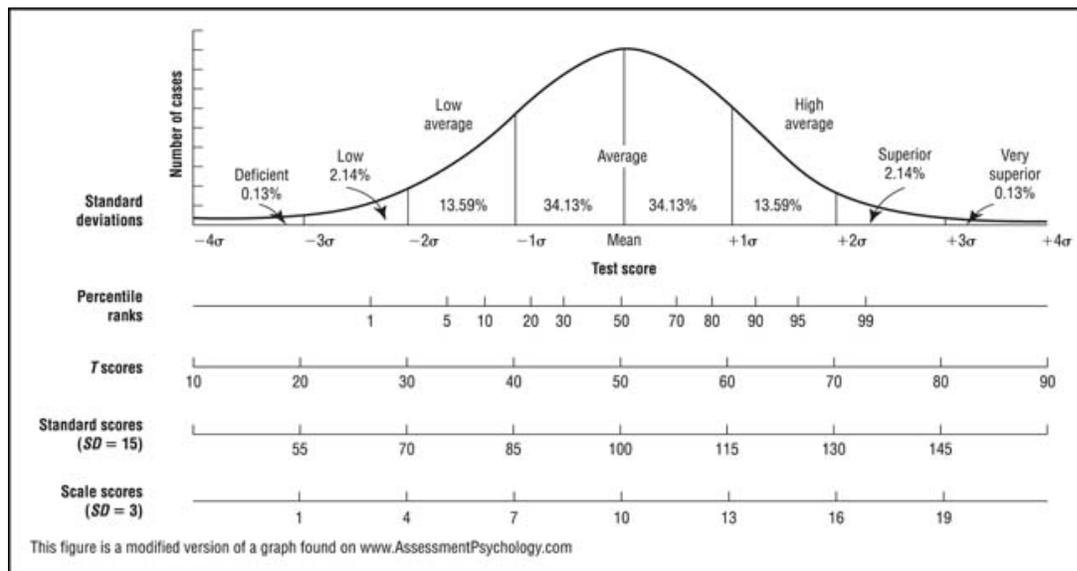
Sandavol, Maria  
DOB: 8/6/1994

2

## ASSESSMENT PROCEDURES

The assessment materials and procedures used during this evaluation were selected and administered so as not to be racially, culturally, or sexually discriminatory. The effects of environmental, cultural, or economic disadvantage were considered in selection and administration of the instruments used. These materials and procedures were administered in the client's primary or language of fluency and have been validated for the specific purpose for which they were used. The assessments were completed in compliance with the publisher of the assessment materials by a qualified examiner. With the exception of informal/alternative assessments, this evaluation used standardized instruments that represent a comparative match of the normal population of this student. Results of standardized tests were used diagnostically in combination with non-standardized assessment procedures to appropriately assess this client's performance and no single procedure was used as the sole criterion for determining eligibility, unique need, or educational recommendations. Unless otherwise stated, this evaluation is considered a valid reflection of Maria's current level of functioning.

## DESCRIPTION OF EVALUATION TERMS



PERCENTILE RANK scores tell you how many individuals performed higher than you (when compared to the same peer group). For example, if you scored within the 50<sup>th</sup> percentile, it means that you scored as well or better than 50% (or half) of individuals who are the same age, grade, and/or gender.

T SCORES have an average of 50 and a range of 1-100. T-scores between 40-60 are considered to fall within the average range of functioning.

STANDARD SCORES have an average of 100 and a range of 40-160. Standard scores of 85-115 are considered to fall within the statistically average range of functioning.

Sandavol, Maria  
DOB: 8/6/1994

3

SCALE SCORES have an average of 10 and a range of 1-19. Scale scores of 7-13 are considered to fall within the average range of functioning.

### CURRENT ASSESSMENT INSTRUMENTS/MEASURES

Review of records including health, developmental, and relevant medical information was included in this assessment. Testing behavioral observations were completed during the testing dates and are noted herein.

Informal Measures	Assessment Dates
Client Interview	10/9/2021
Review of Relevant records	10/9/2021
Testing Observations	10/9/2021

Language Measures	Assessment Dates
Woodcock Johnson-IV Test of Oral Language The WJ IV Tests of Oral Language can be used to determine and describe an individual's strengths and weaknesses with regard to expressive language.	10/9/2021

Academic Achievement Measures	Assessment Dates
Wechsler Individual Achievement Test, 4 <sup>th</sup> Edition (WIAT-IV) The WIAT-III is an individually administered test that evaluates academic achievement in reading, math, and writing, and oral language (expressive and receptive).	10/9/2021

Vocational/Personality/Strengths Interest Testing	Assessment Dates
Sokanu Career Test Sokanu is a career matching platform that helps people find their ideal career. Sokanu accomplishes this in two ways. The first is through the world's best career test — a prediction engine built from the ground up using the latest innovations in psychometrics and machine learning. The second is through Sokanu's 750 career profiles, containing thousands of pieces of unique content aimed at helping people understand and enter careers.	10/9/2021
Truity- Vocational and Personality Testing The Truity Career Personality Profiler is a comprehensive, scientifically validated career test that measures both your interests and your personality traits so you can find the right career for you.	10/9/2021

#### 16 Personalities Testing

Computer based testing using the Meyers-Briggs Personality profiles. 10/9/2021

### BACKGROUND INFORMATION (HISTORY AND REVIEW OF RECORDS)

Sandavol, Maria  
DOB: 8/6/1994

4

## CALWORKS LEP INTERVIEW QUESTIONS:

### Linguistic Biography – Interview Questions

1. Basic Personal History – Where were you born?
2. What is the native language there?  
How long did you live there?  
At what age did you learn English?
3. What resources did you have available for learning English? Classrooms, ESL / Bilingual classes, playmates, television, etc.
4. What was helpful and what was not helpful for learning English?
5. Can you tell me about your family members, and what they speak? How did they learn?
6. Do you know any other languages besides your native one and English?
7. Can you briefly give me any information on your native language?
8. How do you feel about your first language? When do you use it?
9. With whom do you use it? Is important for you / your kids to retain fluency in it?
10. How do you feel about your English? Confident, self-conscious, proud, ashamed?
11. How do you perceive society's acceptance of your use of your native language? 10.  
How does society perceive your use of English?
12. Have you ever felt discriminated against because of your accent?
13. Were you eager to learn English? Apprehensive? What was your reason for learning English?

### Job/Vocational Questions

1. Do You have severe difficulty reading?
2. Does Your reading problem is not severe, but it is still hard for you to read large amounts of material?
3. Do You lose things frequently?
4. Do You have difficulty following spoken directions?
5. Do You have difficulty understanding the underlying message of what is said?
6. Do You tend to forget deadlines?

Sandavol, Maria  
DOB: 8/6/1994

5

7. Do You have difficulty doing more than one task while managing interruptions from co-workers?
8. Are Your spelling and grammar are poor?
9. When you copy or calculate figures, do you tend to reverse or confuse number sequences?
10. You have no inner sense of direction (you have been known to get lost in your own building)?
11. Are easily distracted and you work in an open space?
12. Do you have short-term memory problems (details such as names and numbers tend to be easily forgotten)?
13. Do You have difficulty learning a lot of information quickly in intensive training classes and conferences?

#### TESTING BEHAVIOR

##### Communication

Maria participated in appropriate social dialogue. She engaged in normal small talk and initiated conversation in order to connect with the examiner. Maria's language articulation, speech productivity, and speech manner were normal.

Maria's communication was not impeded in any way and She demonstrated satisfactory and receptiveness. Auditory comprehension was adequate and oral delivery was effective. Maria's speech was without articulatory deficit. Her comprehension of English was normal and She did not need have to have instructions rephrased, simplified, or repeated.

##### Interpersonal

Rapport was easily established with the examiner. Maria's interpersonal skills during testing could be described as friendly, cooperative, and laid-back.

##### Attention

During testing, Maria's attention behavior could be described as attentive and alert. She could focus on and select the relevant information from among the irrelevant aspects of a situation and could maintain the focus and resist distraction. Maria's attention was sufficient for responding to questions.

Sandavol, Maria  
DOB: 8/6/1994

6

### Cognitive

Maria's cognitive functioning could be described as stable. She did not dwell on past failures and incorrect responses, and She appeared to be feigning good spirit.

### Emotional

Maria's emotional functioning during testing could be described as self-confident, humorous, and sincere.

### Problem solving

Maria's problem-solving skills could be described as normal She did not have difficulty with concept formation, judgement, abstraction, opposites/similarities/differences, comparative analogies, and/or absurdities. Maria had common-sense and a functional understanding of everyday objects. She was able to form concepts well, and handled ideas well and without concreteness.

## ORAL LANGUAGE PROCESSING

### WOODCOCK-JOHNSON TEST OF ORAL LANGUAGE-IV

The WJ IV Tests of Oral Language can be used to determine and describe an individual's strengths and weaknesses with regard to expressive language. The 12-test battery includes nine English tests and three Spanish tests, all of which are included in a single test easel. Depending on the purpose and extent of the assessment, an examiner can use any of these tests independently or in conjunction with the WJ IV COG and/or WJ IV ACH.

Language Processing			
This is your knowledge of word meaning and your ability to communicate verbally.			
Measure: Composite/Subtest	Score	PR	Classification
Oral Language Battery			
<b>WJ-OL: Picture Vocabulary</b>			
How easily and correctly the person can identify and name or explain the picture is determined in this test.	100	50	Expected
<b>WJ-OL: Oral Comprehension</b>			
The proficiency checkers speaks something and the assessee is supposed to repeat or comprehend the meaning or expression of what has been spoken.	100	50	Expected
<b>WJ-OL: Segmentation</b>			
In this test, the assessee's capability to break the word into phonemes, or sentences into words, is checked. The test comprises checking a person's phonetic coding ability.	100	50	Expected

Sandavol, Maria  
 DOB: 8/6/1994

7

<p><b>WJ-OL: Rapid Picture Naming</b>                  A number of pictures are shown to the assessee one by one and asked to name those.</p>	100	50	Expected
<p><b>WJ-OL: Sentence Repetition</b>                  A sentence is spoken to the person taking WJ-IV tests of oral language in this subtest.</p>	100	50	Expected
<p><b>WJ-OL: Understanding Directions</b>                  The participant is given a set of directions. He then repeats back the directions given to him. This subtest tells about the reasoning ability of a person in addition to determining his or her listening comprehension ability</p>	100	50	Expected
<p><b>WJ-OL: Sound Blending</b>                  Any word, sentence, or names are spoken to the person taking the oral language subtests.</p>	100	50	Expected
<p><b>WJ-OL: Retrieval Fluency</b>                  measures an aspect of long term retrieval.</p>	100	50	Expected
<p><b>WJ-OL: Sound Awareness</b>                  This test measures phonological abilities and is composed of two subtests.</p>	100	50	Expected
<p><b>WJ-OL: Vocabulario Sobre Dibujos-</b>                  this test measures oral language development and lexical knowledge in Spanish.</p>	100	50	Expected
<p><b>WJ-OL: Comprension Oral</b> This test of oral language measures the ability to comprehend short audio-recorded passages and then supply the missing words.</p>	100	50	Expected
<p><b>WJ-OL: Comprension de Indicaciones</b> this test requires a person to listen to a sequence of audio-recorded instructions and then follow the directions by pointing to objects in a colored picture.</p>	100	50	Expected

WJ-IV Clusters			
Index Measures	Standard Score	Percentile	Description
Oral Language Cluster	100	50	Expected
Broad Oral Language	100	50	Expected
Listening Comprehension	100	50	Expected
Phonetic Coding	100	50	Expected

Sandavol, Maria  
DOB: 8/6/1994

8

Speed of Lexile Access	100	50	Expected
Lenguaje Oral	100	50	Expected
Amplio Lenguaje Oral	100	50	Expected
Comprension Auditiva	100	50	Expected

Although the format is the same as the English versions, the tests have different items in Spanish. When appropriate, these tests can be administered to help determine an individual's language abilities and to compare an *individual's proficiency on English and Spanish language tasks through the Comparative Language Index (CLI)*.

Dual administration may be helpful in classifying the individual's language proficiency as is frequently required in California Government and Community Programs. Additionally, the CalWORKS client can gain a better understanding of their language abilities in order to make more informed high education, vocational, and work related decisions.

**Based on the results of this test your processing strengths are:**

**Based on the results of this test your processing weaknesses are:**

Based on the results of this evaluation, you are a kinesthetic multisensory learner. It will take you longer to learn information, but you can learn the information. Practicing what you are expected to learn, will always help you.

## ACHIEVEMENT

### Reading Comprehension/Fluency

Reading Comprehension is the ability to comprehend written discourse. Reading fluency includes the rate and accuracy of one's reading ability.

Measure: Composite/Subtest	Score	PR	Classification
WIAT-4 Reading Comprehension			
Reading passages out loud or silently under non-timed condition. Then answering open ended questions about the passages.	100	50	Average
WIAT-4: Reading Fluency	100	50	Average

Sandavol, Maria  
 DOB: 8/6/1994

9

WIAT-4: Word Reading	100	50	Average
WIAT-4 Pseudoword Reading	100	50	Average

Written Expression

Written language includes the breadth and depth of an individual’s acquired store of declarative and procedural writing skill. Specifically, writing ability is the communication of information and ideas in written form so that others can understand (with clarity of thought, organization, and good sentence structure). It is a broad ability that involves a number of other writing sub-skills (e.g. knowledge of grammar, the meaning of words, and how to organize sentences or paragraphs).

Measure: Composite/Subtest	Score	PR	Classification
----------------------------	-------	----	----------------

WIAT-III Essay Composition: Theme Development & Text Organization	100	50	Average
---	-----	----	---------

Mathematical Calculation, Reasoning Results, & Fluency

Mathematical calculation is the ability to solve math problems using computational skills. Mathematical reasoning is the ability to analyze and solve math problems. Mathematical fluency includes the rate and accuracy of mathematical information expressed.

Measure: Composite/Subtest	Score	PR	Classification
----------------------------	-------	----	----------------

WIAT-III Numerical Operations: Performing a variety of math calculations	100	50	Average
WIAT-III Math Problem Solving Application of real world math problems	100	50	Average

VOCATIONAL INTERESTS/PERSONALITY FUNCTIONING

Sokanu Vocational Testing

Sokanu is a career matching platform that helps people find their ideal career. Sokanu accomplishes this in two ways. The first is through the world’s best career test — a prediction engine built from the ground up using the latest innovations in psychometrics and machine learning. The second is through Sokanu’s 750 career profiles, containing thousands of pieces of unique content aimed at helping people understand and enter careers.

Truity Vocational Testing

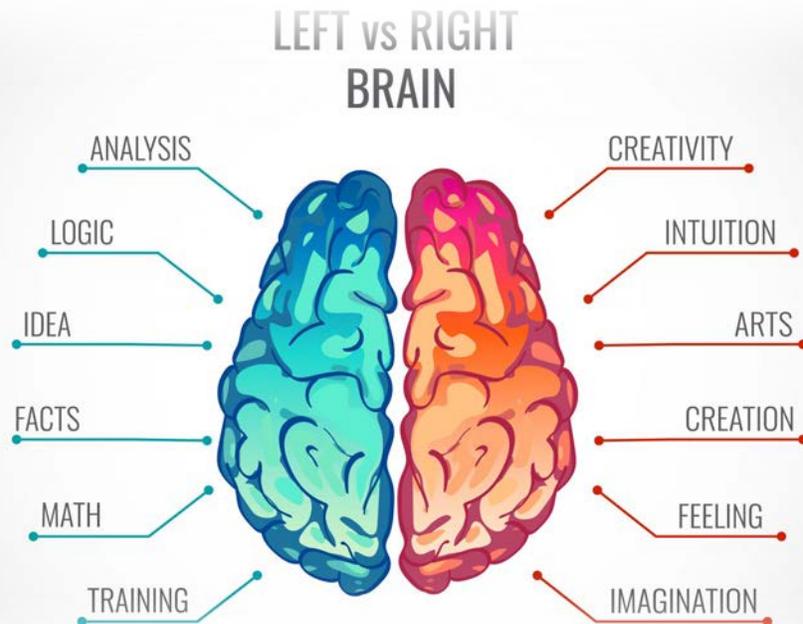
The Truity Career Personality Profiler is a comprehensive, scientifically validated career test that measures both your interests and your personality traits so you can find the right career for you.

Sandavol, Maria  
DOB: 8/6/1994

10

### 16 Personalities Testing

Computer based testing using the Meyers-Briggs personality profiles.



#### EVALUATION SUMMARY

This section summarizes Maria's language strengths and weakness and identify if her level of English Proficiency would qualify as LEP. This section also identifies the clients general aptitude and cognitive level.

Maria's short term employment goals would be:

Maria's long term employment goal would be:

Maria's educational goal/s would be:

The employment goal that Maria has would be discussed here as well as the employment market information taken from Sokanu Career Test results as they relate to Fresno Job Market.

Sandavol, Maria  
DOB: 8/6/1994

11

RECOMMENDATIONS

1. Maria’s LEP goals will be provided here, as well as her supports through the CalWORKS program. Clear guidelines will be provided for CalWORKS social workers and program managers related to LEP.
2. Vocational recommendations based on testing data will be discussed here.
3. Local Information such as colleges, higher educational vocational programs, online programs, regional center, or department of rehabilitation may also be included per Fresno County Guidelines.
4. Any additional work/educational/CalWORKS accommodations would also go here.

Lastly, it was a privilege to work with Maria throughout this evaluation.



Rienzi Haytasingsh, Psy.D., ABSNP  
Diplomate, American Board of School Neuropsychology  
Licensed Educational Psychologist  
California LEP # 2732

\_\_\_\_\_ Date

**EVALUATION OF**  
**RFP #23-006**

Evaluation Team Results

<b>RFP NO.</b>	<b>Title</b>	<b>Date</b>
23-006	Welfare-to-Work Specialized Assessments	

<b>Bidder</b>	<b>Rank</b>

Recommended Bidder: \_\_\_\_\_

**EVALUATION OF**

**RFP #23-006**

**DEPARTMENT LEAD TO COMPLETE**

**Vendor Name:**

<b>Scope of Work Requirements</b>	<b>Comments</b>
<ul style="list-style-type: none"><li>• How does the vendor demonstrate understanding of the requested assessment services and the information required in assessment reports?</li><li>• How does the vendor describe familiarity or experience in providing the specified assessments to the identified target population?</li><li>• How will services be carried out? Is the service model advantageous to the Department and clients?</li><li>• How well does the vendor demonstrate knowledge or awareness of the problems associated with providing the services proposed and of laws, regulations, and effective operating principles required to provide these services?</li><li>• How well does the vendor demonstrate understanding of required reporting and documentation?</li><li>• Is the vendor able to provide the optional additional requested services (i.e., informational presentations and videos)?</li><li>• Does the proposed service location include a site in metro Fresno, and how accessible is the site for clients?</li><li>• Is the vendor able to provide services to rural locations through a mobile team? Or is the vendor able to provide supplemental online access to rural clients? Overall, is the vendor able to meet rural client needs?</li><li>• How well does the vendor demonstrate that they have staff that meet the staff requirements?</li></ul>	

**EVALUATION OF**  
**RFP #23-006**

- Is the vendor able to begin services starting January 1, 2023?
- Which assessments will be used, and are they appropriate for client needs?
- Overall, will the proposed services satisfy County's needs, and to what degree?

--	--

Exceeds  Meets  Lacks

Comments/Notes:

--	--

**EVALUATION OF**  
**RFP #23-006**

<b>Cost Proposal</b>	<b>Comments</b>
<ul style="list-style-type: none"><li>• Did vendor complete Exhibit A: Cost Proposal, including the narrative portion?</li><li>• How reasonable and appropriate is the budget for the services rendered?</li><li>• Does the vendor bill for no-shows/cancellations?</li><li>• How did this vendor's Cost Proposal compare to other bidders? Include specific details/examples.</li><li>• How well does the vendor show understanding of the anticipated service volume?</li></ul>	
<p><input type="checkbox"/> Exceeds   <input type="checkbox"/> Meets   <input type="checkbox"/> Lacks</p> <p>Comments/Notes:</p>	

**EVALUATION OF**  
**RFP #23-006**

<b>Miscellaneous Requirements</b>	<b>Comments</b>
<ul style="list-style-type: none"><li>• Does the vendor indicate their intent NOT to comply with any of the requirements stated under the “General Requirements &amp; Conditions”, “Insurance Requirements” and “Scope of Work Proposal Requirements” sections of the RFP? If so, how does it affect their ability to provide services?</li><li>• If materials (e.g. letters of support) are included, what do they indicate about the bidder's capability to provide the requested services?</li><li>• Are there any judgments, litigation, licensing or certification, or other violations, outstanding or resolved, that are associated with the bidder, individual agency, or corporation? If so, what do they indicate about the organization?</li><li>• Are there any contracts terminated before completion within the last five years, and if so, why?</li><li>• Is there a completed reference list?</li><li>• Was data provided? If so, does it support and/or document the effectiveness of the proposed services?</li><li>• Is the vendor’s organizational plan and management/staffing structure adequate and appropriate for overseeing the proposed services?</li></ul>	

**EVALUATION OF**  
**RFP #23-006**

Exceeds  Meets  Lacks

Comments/Notes:

**EVALUATION OF**  
**RFP #23-006**

**Discussion Summary Recommendation:**  
**(Provide a Minimum of One Paragraph)**

\*\*\*Please do not leave any sections blank\*\*\*

**EVALUATION OF**  
**RFP #23-006**

Evaluation Team Results

<b>RFP NO.</b>	<b>Title</b>	<b>Date</b>
23-006	Welfare-to-Work Specialized Assessments	10/10/2022

<b>Bidder</b>	<b>Rank</b>
Foster Assessment Center & Testing Service, Inc.	1

Recommended Bidder: Foster Assessment Center & Testing Service, Inc.

## EVALUATION OF

### RFP #23-006

#### DEPARTMENT LEAD TO COMPLETE

**Vendor Name:** Foster Assessment Center & Testing Service, Inc.

Scope of Work Requirements	Comments
<ol style="list-style-type: none"><li>1. How does the vendor demonstrate understanding of the requested assessment services and the information required in assessment reports?</li><li>2. How does the vendor describe familiarity or experience in providing the specified assessments to the identified target population?</li><li>3. How will services be carried out? Is the service model advantageous to the Department and clients?</li><li>4. How well does the vendor demonstrate knowledge or awareness of the problems associated with providing the services proposed and of laws, regulations, and effective operating principles required to provide these services?</li><li>5. How well does the vendor demonstrate understanding of required reporting and documentation?</li><li>6. Is the vendor able to provide the optional additional requested services (i.e., informational presentations and videos)?</li><li>7. Does the proposed service location include a site in metro Fresno, and how accessible is the site for clients?</li><li>8. Is the vendor able to provide services to rural locations through a mobile team? Or is the vendor able to provide supplemental online access to rural clients? Overall, is the vendor able to meet rural client needs?</li><li>9. How well does the vendor demonstrate that they have staff that meet the staff requirements?</li></ol>	<ol style="list-style-type: none"><li>1. The vendor shows good understating of the requested services. They provided plenty of detailed information. FACTS has years of experience working with Fresno County.</li><li>2. The vendor is very familiar with providing assessments to the target population. They have experience working with the same target population in other counties, and in Fresno County.</li><li>3. Services under this vendor seem to take the role of the Job Specialist a lot more than the just doing assessments. Although they had a robust understanding of what it will take to provide services to the County, they offered many extra services that were not necessarily asked for in the RFP, such as testing for physical abilities. As a result of their experience working with this population, they understand that in person services are best, rather than providing technology-based assessments which can create barriers. They will also re-test clients if more testing is necessary.</li><li>4. The vendor showed good awareness of problems associated with providing these services. They have experience providing CalWORKs services to other Counties.</li><li>5. The vendor shows good understanding of the required reporting and documents as they have years of experience in working with Fresno County and their participants.</li><li>6. Yes, they are able to provide all optional requested services. However, they do charge for them while the other bidder does not.</li><li>7. Yes. The proposed service locations are highly accessible. The vendor has knowledge of bus routes to the site. The service location meets ADA guidelines and CARF standards. They stated they are available to participants during non-traditional hours when requested by a Job Specialist.</li><li>8. Yes, the vendor will utilize DSS offices in Reedley and Selma. Panel members agreed that the bid demonstrated flexibility when it comes to providing services for the clients.</li></ol>

**EVALUATION OF**  
**RFP #23-006**

- 10. Is the vendor able to begin services starting January 1, 2023?
- 11. Which assessments will be used, and are they appropriate for client needs?
- 12. Overall, will the proposed services satisfy County's needs, and to what degree?

- 9. The certifications of staff were confusing and did not appear completely relevant. It included various vocational educational certifications. They also require a BA in psychology or related field.
- 10. Yes, the vendor is able to provide services starting January 1, 2023.
- 11. The vendor provided a long list of available assessments. Some panel members expressed concerns that the way they would work with the Job Specialists can be confusing. The vendor will test for physical disabilities and work tolerances, though this was not asked for in the RFP.
- 12. Overall, the proposed services meet County's needs. The vendor has a good, clear understanding of what the client needs and how they will meet that.

Exceeds  Meets  Lacks

Comments/Notes:

Overall, the vendor meets the needs of the requested services. Although they are available to provide all requested services, they do list other services they will provide that were not requested by the RFP. The committee was impressed with FACTS' years of experience serving the target population in Fresno County. The vendor also has service locations in metro Fresno, and will utilize DSS locations in Reedley and Selma.

**EVALUATION OF**  
**RFP #23-006**

Cost Proposal	Comments
<ol style="list-style-type: none"> <li>1. Did vendor complete Exhibit A: Cost Proposal, including the narrative portion?</li> <li>2. How reasonable and appropriate is the budget for the services rendered?</li> <li>3. Does the vendor bill for no-shows/cancellations?</li> <li>4. How did this vendor's Cost Proposal compare to other bidders? Include specific details/examples.</li> <li>5. How well does the vendor show understanding of the anticipated service volume?</li> </ol>	<ol style="list-style-type: none"> <li>1. Yes, the amount of detail on the narrative met what was requested. They were very specific about what they would charge for.</li> <li>2. The vendor's costs appeared reasonable to the majority. Although higher, it compares well to the other proposal. Their cost shows they are experienced and have the background knowledge of what it takes to provide the services.</li> <li>3. The vendor does bill for no-shows and cancellations.</li> <li>4. The Costs Proposal is higher than the other bidder. This is due to charging for no-shows, trainings, monthly activities and presentations. The cost for virtual presentations is expensive, on top of costs for ongoing activities. Although the cost is high, some thought it was justified and reasonable, and the vendor should charge enough to cover services provided.</li> <li>5. The vendor shows a good understanding of the anticipated service volume.</li> </ol>

Exceeds  Meets  Lacks

Comments/Notes:

The majority thought that the overall cost is reasonable. The Cost Proposal is strong with exception of charging for no shows and a high cost for presentations. The cost was significantly higher than the other proposal, but the panel agreed that the cost may be higher due to the bidder being more knowledgeable and realistic about the cost of providing the services. The RFP stated the preference for not charging for no-shows, and this vendor did bill for them. The vendor also billed for the optional requested services and monthly reporting activities, which shows that they are realistic about operational costs and know what it takes to provide services. However, this did result in a significantly higher overall cost, which was less favorable than the cheaper cost of the other vendor.

**EVALUATION OF**  
**RFP #23-006**

Miscellaneous Requirements	Comments
<ol style="list-style-type: none"> <li>1. Does the vendor indicate their intent NOT to comply with any of the requirements stated under the “General Requirements &amp; Conditions”, “Insurance Requirements” and “Scope of Work Proposal Requirements” sections of the RFP? If so, how does it affect their ability to provide services?</li> <li>2. If materials (e.g. letters of support) are included, what do they indicate about the bidder's capability to provide the requested services?</li> <li>3. Are there any judgments, litigation, licensing or certification, or other violations, outstanding or resolved, that are associated with the bidder, individual agency, or corporation? If so, what do they indicate about the organization?</li> <li>4. Are there any contracts terminated before completion within the last five years, and if so, why?</li> <li>5. Is there a completed reference list?</li> <li>6. Was data provided? If so, does it support and/or document the effectiveness of the proposed services?</li> <li>7. Is the vendor's organizational plan and management/staffing structure adequate and appropriate for overseeing the proposed services?</li> </ol>	<ol style="list-style-type: none"> <li>1. No, the vendor did not indicate any reasons for not complying.</li> <li>2. The letters of support stated they met contractual requirements. The letters of support indicated the vendor met contractual requirements, but did not speak as highly of them as the other bidder's letters did.</li> <li>3. None.</li> <li>4. None.</li> <li>5. Yes. Their reference list was more diverse than the other provider. It included reference from many different entities and 30+ years of experience.</li> <li>6. Yes, customer satisfaction data was provided, which supported that they had very satisfied participants and Job Specialists.</li> <li>7. It was agreed that the vendor has the management and staffing structure needed to meet the service's needs. It was also noted that they have a very robust quality assurance processes documented.</li> </ol>

Exceeds  Meets  Lacks

Comments/Notes:

Although their reference letters did not speak to their quality of service as much as the other bidder's letters, FACTS letters were from a more diverse set of references and from entities who had used them for substantially longer. Their staffing structure meets the needs of the RFP. Overall, they met the RFP's miscellaneous requirements adequately.

**EVALUATION OF**  
**RFP #23-006**

**Discussion Summary Recommendation:**  
**(Provide a Minimum of One Paragraph)**

Overall, FACTS met the requests of the RFP. The vendor showed good understanding of the services requested and would be able to provide the services if selected. The vendor provided more services than just the assessments, with a strong focus on vocational evaluation. However, their ability to go above and beyond and be flexible to meet the needs of the county stood out to the panel. Their service model was more focused on in-person services, which the majority of the panel strongly preferred, and did not include multiple contacts with the client. Some of the testing times were considered long (up to two days), but may be more realistic. Although their cost is reasonable, it is significantly more than the other bidder. The majority of the panel was impressed by their focus on client-centered, in-person services, which they considered best for the target population.

**\*\*\*Please do not leave any sections blank\*\*\***

**EVALUATION OF**  
**RFP #23-006**

Evaluation Team Results

<b>RFP NO.</b>	<b>Title</b>	<b>Date</b>
23-006	Welfare-to-Work Specialized Assessments	10/10/2022

<b>Bidder</b>	<b>Rank</b>
Brain Learning Psychological Corp	2

Recommended Bidder: Foster Assessment Center & Testing Services, Inc.

## EVALUATION OF

### RFP #23-006

#### DEPARTMENT LEAD TO COMPLETE

**Vendor Name:** Brain Learning Psychological Corp

Scope of Work Requirements	Comments
<ol style="list-style-type: none"><li>1. How does the vendor demonstrate understanding of the requested assessment services and the information required in assessment reports?</li><li>2. How does the vendor describe familiarity or experience in providing the specified assessments to the identified target population?</li><li>3. How will services be carried out? Is the service model advantageous to the Department and clients?</li><li>4. How well does the vendor demonstrate knowledge or awareness of the problems associated with providing the services proposed and of laws, regulations, and effective operating principles required to provide these services?</li><li>5. How well does the vendor demonstrate understanding of required reporting and documentation?</li><li>6. Is the vendor able to provide the optional additional requested services (i.e., informational presentations and videos)?</li><li>7. Does the proposed service location include a site in metro Fresno, and how accessible is the site for clients?</li><li>8. Is the vendor able to provide services to rural locations through a mobile team? Or is the vendor able to provide supplemental online access to rural clients? Overall, is the vendor able to meet rural client needs?</li><li>9. How well does the vendor demonstrate that they have staff that meet the staff requirements?</li></ol>	<ol style="list-style-type: none"><li>1. The vendor shows a thorough understanding of the work. The provided assessments were easy to read and showed that the vendor has a good understanding of what the barriers are. They demonstrated creative solutions to overcome barriers and multiple solutions on how to accommodate.</li><li>2. The vendor has not provided services in Fresno, however, they do provide CalWORKs related services in San Diego, Lake, and Sonoma Counties. The owner has twenty-five years of experience, including college instruction. They understand that clients are hard to reach and have barriers.</li><li>3. The vendor's approach is different from what is currently implemented. They are very comfortable with virtual assessments. Assessments would be carried about by psychologists on staff, and then a meeting between the psychologist, Job Specialists, and client would take place to discuss the results. Some on the panel expressed that this could cause some clients to get lost in the process. The vendor did provide different ways to reach clients which include traveling to rural offices and online assessments.</li><li>4. The vendor showed good awareness of problems associated with providing these services. They have experience providing the services to other counties, which was apparent from their bid.</li><li>5. The vendor provided clear and easy to read examples that show a good understanding of what is required. They showed understanding electronic documentation. Assessments are password protected and can be sent in bulk for invoicing if necessary. The vendor has staff designated for data tracking and finance.</li><li>6. Yes, the vendor is able to provide the optional additional requested services at no cost.</li><li>7. The vendor proposed two service locations in metro Fresno. The bid states that the lease will be signed by December 15, 2022 provided that the contract is executed by November 22, 2022.</li></ol>

**EVALUATION OF**  
**RFP #23-006**

- 10. Is the vendor able to begin services starting January 1, 2023?
- 11. Which assessments will be used, and are they appropriate for client needs?
- 12. Overall, will the proposed services satisfy County's needs, and to what degree?

- 8. Yes, the vendor can provide services to the rural community either by traveling to the client for in-person services at DSS offices, or through remote services. There were concerns that they may be unfamiliar with the distances needed that to be traveled in the rural areas.
- 9. The vendor demonstrates understating and meets the staff requirements. All staff members are at least nationally certified school psychologists.
- 10. Yes, provided that the agreement is executed by November 22, 2022 as the vendor has not signed a lease for a metro Fresno location.
- 11. Assessments that will be used are WAIS-IV, WIAT-IV, Woodcock Johnson and vocational testing through Truity, which are appropriate. Panel members agreed that the Sokanue sample test provided was not suitable for the local Fresno market. The vocational recommendation (gemologist) that was not relevant to local needs, and was not favored by the review panel.
- 12. Overall, the proposed services would meet County's needs, with some reservations about a service model that requires multiple points of contact for the client and an emphasis on technology.

Exceeds  Meets  Lacks

Comments/Notes:

Overall, the proposal meets the RFP requirements. Concerns were expressed that the vendor is over-promising and may not have the capacity to deliver all that they are committing to. The vendor stated that 80 assessments per month is their current capacity. Panel members expressed concerns that they are not addressing all barriers. Their work is focused on assessments and does not overlap with Job Specialist role, which is what the RFP requested. However, more focus on resolving participant barriers is helpful for the Department. Another concern is that their assessments would consist of two to three different contacts. Participants may be difficult to reach through all contacts, and County may lose participants due to this. However, Brain Learning's overall understanding of services was strong and they are a good candidate for providing services overall.

**EVALUATION OF**  
**RFP #23-006**

<b>Cost Proposal</b>	<b>Comments</b>
<ol style="list-style-type: none"><li>1. Did vendor complete Exhibit A: Cost Proposal, including the narrative portion?</li><li>2. How reasonable and appropriate is the budget for the services rendered?</li><li>3. Does the vendor bill for no-shows/cancellations?</li><li>4. How did this vendor's Cost Proposal compare to other bidders? Include specific details/examples.</li><li>5. How well does the vendor show understanding of the anticipated service volume?</li></ol>	<ol style="list-style-type: none"><li>1. Yes, the vendor completed a cost proposal that was well done with a breakdown by category and language. The full budget was provided explaining all costs.</li><li>2. The budget was reasonable and appropriate, and a full breakdown was provided.</li><li>3. The vendor does not bill for no-shows or cancellations.</li><li>4. The cost proposal was less than the other bidder. This is due to not charging for no-shows, trainings, or presentations. Total costs are included in the price of the assessments.</li><li>5. Some panel members were concerned that not billing for a number of requested line items (in addition to no shows) was not reasonable given they are also providing services in 3 other counties. Some believed that they under-bid and that the costs as proposed would not be reasonable for the vendor long-term, and that services to clients would be impacted. However, they did allow for increases in their budget, and charged more for LEP reports than the other bidder.</li></ol>
<p><input type="checkbox"/> Exceeds <input checked="" type="checkbox"/> Meets <input type="checkbox"/> Lacks</p> <p>Comments/Notes:</p> <p>The total Cost Proposal was lower than the other bidder. Although the cost was reasonable and appropriate, there were concerns that the vendor may be over promising for the price. It was discussed that not charging for no-shows/cancellations and trainings/presentations may impact the quality of services as that cost will be accounted for elsewhere. However, the RFP stated that no cost is preferred for no-shows and cancellations, and their budget had increases built into it, showing that were aware of the potential for increasing operating costs.</p>	

**EVALUATION OF**  
**RFP #23-006**

Miscellaneous Requirements	Comments
<ol style="list-style-type: none"> <li>1. Does the vendor indicate their intent NOT to comply with any of the requirements stated under the “General Requirements &amp; Conditions”, “Insurance Requirements” and “Scope of Work Proposal Requirements” sections of the RFP? If so, how does it affect their ability to provide services?</li> <li>2. If materials (e.g. letters of support) are included, what do they indicate about the bidder's capability to provide the requested services?</li> <li>3. Are there any judgments, litigation, licensing or certification, or other violations, outstanding or resolved, that are associated with the bidder, individual agency, or corporation? If so, what do they indicate about the organization?</li> <li>4. Are there any contracts terminated before completion within the last five years, and if so, why?</li> <li>5. Is there a completed reference list?</li> <li>6. Was data provided? If so, does it support and/or document the effectiveness of the proposed services?</li> <li>7. Is the vendor's organizational plan and management/staffing structure adequate and appropriate for overseeing the proposed services?</li> </ol>	<ol style="list-style-type: none"> <li>1. No, nothing was mentioned that shows the vendor's intent to not comply.</li> <li>2. The two letters of support that were provided spoke well of the vendor and their capabilities.</li> <li>3. None.</li> <li>4. None.</li> <li>5. Yes. The company is newer when compared to the other vendor, which is reflected in their references.</li> <li>6. The review team noted that they didn't see a lot of data. The bid stated what they are able to do.</li> <li>7. Yes, the management structure was deemed adequate and appropriate. Their billing/finance person also does data, which was preferred by some panel members.</li> </ol>
<p><input type="checkbox"/> Exceeds   <input checked="" type="checkbox"/> Meets   <input type="checkbox"/> Lacks</p> <p>Comments/Notes:</p> <p>The letters of support spoke highly of the vendor. It appeared that they met all organizational preferences and that they would adequately be able to provide services as requested. The vendor appeared very capable of meeting all needs based on the requirements included in this section.</p>	

**EVALUATION OF**  
**RFP #23-006**

**Discussion Summary Recommendation:**  
**(Provide a Minimum of One Paragraph)**

Overall, Brain Learning met the requests of the RFP. The vendor showed good understanding of the services requested and would be able to provide the services if selected. They provided a well-organized and well-rounded proposal with a lower cost. Although the RFP had a preference no charging for no-shows, the vendor also did not charge for orientation videos, DSS staff trainings, and presentations. The panel was concerned that they may have under-bid and would not be able to sustain services at that price. However, overall, the lower Cost Proposal was a strength of the bid. There were also concerns that the example vocation of gemologist recommended in the sample assessment was not relevant to the local job market. Additionally, there were concerns about the service structure which has an emphasis on use of technology. This might create barriers for the target population. However, the vendor seems overall very capable and has heart and passion for the work. They are a strong candidate for services but may need assistance in meeting local needs.

**\*\*\*Please do not leave any sections blank\*\*\***



November 29, 2022

Gary Cornuelle, Purchasing Manger  
Fresno County ISD Purchasing  
333 W. Pontiac Way  
Clovis, CA 93612

RE: Funding Recommendation for Request for Proposal (RFP) #23-006 (Welfare-to-Work Specialized Assessments)

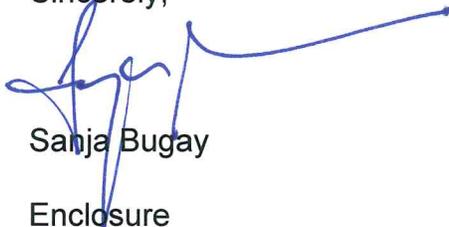
Dear Mr. Cornuelle,

Attached is the Summary of Evaluation for RFP 23-006, Welfare-to-Work Specialized Assessments. A recommendation was made by the RFP Review Committee to award these services to Foster Assessment Center & Testing Service, Inc.

The Department has reviewed and does not concur with the Review Committee's recommendation. It was determined to instead contract with Brain Learning Psychological Corp, due to their capability of providing a similar level of service at a significantly lower cost. Upon tentative award notification, the Department will initiate contract negotiations.

If you have any questions, please contact Leah Melidonian, Senior Staff Analyst, at (559) 600-3061.

Sincerely,



Sanja Bugay

Enclosure

**SUMMARY OF EVALUATION**  
**RFP #23-006**  
**Welfare-to-Work Specialized Assessments**

**TIMELINE**

RFP RELEASE	August 26, 2022
BIDDERS' CONFERENCE	September 7, 2022
ADDENDUM RELEASE	September 13, 2022
RFP CLOSING	September 23, 2022
EVALUATION COMMITTEE REVIEW AND RANKING	October 10, 2022
SECOND EVALUATION COMMITTEE REVIEW AND RANKING	October 25, 2022
TENTATIVE BOARD DATE FOR AGREEMENT	January 24, 2023

**SUMMARY OF REQUESTED SERVICES**

The RFP sought proposals from qualified vendors to provide Welfare-to-Work Specialized Assessments for Limited English Proficiency (LEP), Learning Disability Evaluations (LDE), and Independent Assessments (third party review). The RFP indicated the Department of Social Services intended to select a single vendor to serve recipients of California Work Opportunity and Responsibility to Kids (CalWORKs) Welfare-To-Work (WTW) benefits in Fresno County, ages 18-59.

The purpose is to assess WTW participants for language barriers, learning or intellectual disabilities, and other mental, and/or psychological barriers that may prevent an individual from engaging in employment or educational training, with the goal of recommending appropriate accommodations.

The RFP requested services for an eighteen-month base term, from January 1, 2023 through June 30, 2024, with three optional one-year renewals. Bids were requested in a fee-for-service model. Bidders were requested to provide proposed costs for the required assessments, as well as for interpreter services, monthly reporting activities, no shows/cancellations, and outreach presentations and materials for DSS staff and clients. The RFP stated a preference for zero costs for no shows/cancellations.

The Review Committee recommended FACTS as the service provider, but the Department of Social Services does not concur with this recommendation.

**PROPOSALS RECEIVED**

The RFP was sent to vendors registered in Public Purchase and/or on a Bidder's List generated by DSS. This resulted in 45 potential bidders accessing the RFP documents.

Two (2) proposals were received and deemed responsive by County Purchasing and provided to the RFP Review Committee for review:

1. Foster Assessment Center & Testing Service, Inc. (FACTS)
2. Brain Learning Psychological Corp (Brain Learning)

## **RFP REVIEW COMMITTEE MEMBERS**

The Review Committee consisted of five (5) representatives from:

1. Fresno County Department of Social Services (3) – (1) Program Manager, (1) Social Services Program Supervisor, (1) Staff Analyst
2. Workforce Connection (1) – Youth Program Coordinator
3. America Works of California, Inc. (1) – Site Director

All members signed the Confidentiality and Conflict of Interest Certifications. Bid review ranking guidelines were provided to each committee member.

## **REVIEW COMMITTEE FUNDING RECOMMENDATION**

All proposals were considered responsive. The review committee met twice to complete the review process. After a thorough review and discussion, the review committee ranked FACTS higher than Brain Learning, with 3 of 5 reviewers ranking FACTS as their chosen proposal during both ranking meetings.

Brain Learning – The committee acknowledged the organization's positive track record with similar populations in other counties. The committee was also impressed with Brain Learning's ability to be flexible when dealing with participants, with remote assessments being a prominent strength. They provided a well-organized and well-rounded proposal, including an overall lower cost for all requested services, an apparent passion for the work and population, and staff with strong psychological backgrounds. Brain Learning did not bill for requested ancillary services including no-shows (the Department's preference) or for the presentation activities requested (WTW orientation videos, DSS staff trainings, and presentations to the JobWISE program). The Review Committee identified this lack of cost for ancillary services as a weakness as they were concerned Brain Learning would be unable to sustain services at the proposed bid price.

Additionally, they were concerned that the sample job recommendation for the Learning Disability Assessment was unrealistic for the local job market. There was concern about the number of appointments needed with participants. Brain Learning's service model includes an assessment meeting and a results meeting; and some clients may encounter barriers participating in both meetings.

FACTS – The FACTS proposal also had a number of strengths. The committee was impressed with FACTS' years of experience serving the target population in Fresno County. It was agreed that FACTS has a complete understanding of the target populations and the services needed. In particular, the committee was impressed by the focus on client-centered, in-person services, which is considered best for the target population. Their services were considered accessible to clients, with information provided on relevant bus routes and a central office location in Fresno. In addition, staff had strong vocational skills backgrounds, which is helpful in providing robust assessment and evaluation services.

One of the primary weaknesses identified was that the vendor provided services that were not requested, such as testing for physical handicaps and work tolerances, as well as addressing barriers that the Department's staff should be addressing with clients.

Their bid also had a strong focus on vocational assessment. This was not included as a separate cost and was part of FACTS' overall proposal for assessment services. It was discussed that it seems the vendor assesses job skills first, rather than the requested LEP and LDE Assessments.

Overall, the FACTS Cost Proposal was significantly higher than the Brain Learning proposal. A comparison of the Cost Proposal for both bids is below, for Term 1 (18 months) proposed costs:

Fee-for-Service Proposed Rates by Service	Est. Qty. Needed per 12 Months (actual demand will fluctuate)	Term 1 (18 months) January 1, 2023 – June 30, 2024	
		Cost per Service	
		FACTS	Brain Learning
1. LEP Report	75	\$915.00	\$1,300.00
2. LDE Report	65	\$1,595.00	\$1,300.00
3. Independent Assessment (Third Party Review) Report	2	\$500.00	\$250.00
4. Interpreter Services (per minute rate)	1,600	\$1.50	\$4.00
5. Monthly Activities: Prepare Monthly Invoice/Reports, Ongoing Communication with DSS (limit 12 per year)	12	\$2,300.00	\$0
6. No-Shows/Cancellations (zero cost preferred)	120	\$325.00	\$0
7. Produce New or Update WTW Client Orientation Video	1	\$2,000.00	\$0
8. Informational Training Presentations for DSS Staff	5	\$3,000.00	\$0
9. JobWISE Presentations (remote/30min)	24	\$2,000.00	\$0
<b>ESTIMATED TERM COST (for comparison purposes only)</b>		<b>\$460,950.00</b>	<b>\$283,350.00</b>

Three of the five committee members recommended FACTS due to their experience, their ability to serve the target populations with accessible, low-barrier in-person services, and overall responsiveness to the RFP.

**DEPARTMENT OF SOCIAL SERVICES RECOMMENDATION**

The Department of Social Services does not concur with the Review Committee's recommendation to fund Foster Assessment Center & Testing Service, Inc. for the provision of Welfare-to-Work Specialized Assessment services.

The Department's review of the Evaluation Tool completed by the Review Committee for each Proposal found that both vendors met the requirements of the RFP and there is no substantial programmatic benefit that offsets the significantly higher cost of the FACTS proposal (approximately 62% higher cost). The Department finds that the significant difference in cost between the two proposals was not supported by any significant difference in assessment quality for the requested services. The Department further determined that the weaknesses identified in Brain Learning's proposal by the majority of the Review Committee can be mitigated via conversations between the Department and Brain Learning.

The Department recommends the County enter into an agreement with Brain Learning due to a responsive and satisfactory proposal and significantly lower cost than FACTS.



# County of Fresno

INTERNAL SERVICES DEPARTMENT

Facilities • Fleet • Graphics • Purchasing • Security • Technology

## TENTATIVE AWARD NOTICE

November 30, 2022

Subject: Award of Request for Proposal No. 23-006

The County of Fresno has completed its evaluation of all proposals submitted in response to its Request for Proposal Number 23-006 Welfare-to-Work Specialized Assessments.

Pending Board approval, award will be made to Brain Learning Psychological Corp., the most responsive, responsible bidder whose Proposal has been determined to be the most advantageous to the County.

We acknowledge and appreciate the time and effort devoted to the preparation of your Proposal.

If you have any questions, please contact Heather Stevens by phone at (559) 600-7110 or by e-mail at [heastevens@fresnocountyca.gov](mailto:heastevens@fresnocountyca.gov).

### FOR THE COUNTY OF FRESNO

---

Gary E. Cornuelle, Purchasing Manager  
333 W. Pontiac Way  
Clovis, CA 93612

GEC:HS:st

December 5, 2022

Mr. Gary Cornuelle  
County of Fresno Purchasing  
333 West Pontiac Way  
Clovis, CA 93612

Re: Appeal of Tentative Award Notice, Proposal No. 23-006 Welfare-to-Work Specialized Assessments.

Dear Mr. Cornuelle:

Foster Assessment Center & Testing Service, Inc. (FACTS) hereby appeals the funding recommendation by DSS for Proposal 23-006 Welfare-to-Work Specialized Assessments, dated November 29, 2022. FACTS is requesting to uphold the RFP Review Committee's recommendation to award these services to Foster Assessment Center & Testing Service, Inc. (FACTS).

Please be advised this letter is our written notice of appeal, and is being submitted in writing within seven (7) working days after notification of the tentative recommendation for award. As noted in Proposal 23-006 (page 10), this letter is being submitted to the County of Fresno Purchasing, 333. West Pontiac Way, Clovis, CA 93612, and in word format to [gcornuelle@fresnocountyca.gov](mailto:gcornuelle@fresnocountyca.gov). This letter of appeal specifically addresses, per your guidelines, RFP contradictions, procurement errors, proposal rating discrepancies, legality of procurement context and inappropriate or unfair competitive procurement grievance regarding the RFP process.

FACTS is the sole current provider of this contract for the County of Fresno Department of Social Services, and has been since 2016. FACTS is requesting to uphold the Review Committee's decision, as they indicated, "The review committee met twice to complete the review process. After a thorough review and discussion, the review committee **ranked FACTS higher than Brain Learning**, with 3 of 5 reviewers ranking FACTS as their chosen proposal during both ranking meetings."

**FACTS is appealing the tentative award to Brain Learning due to several factors, including:**

- 1) **RFP Contradictions:** In Exhibit A: Cost Proposal, it is clearly written, "Postposed Cost per Instance of Service – The fees below should cover your agency's operational costs for the services. Underlined quantities can be guaranteed. Italicized quantities are estimates based on current trends, and actual quantities may be higher or lower."

*Administrative Office: 516 Pennsfield Place, Suite 108 • Thousand Oaks, CA 91360 • (805) 497-1685 • Fax: (805) 497-2525  
E-mail: ThousandOaks@FosterAssessment.com • Website: FosterAssessment.com*

■ 50 S. Anaheim Blvd., Suite 251 • Anaheim, CA 92805  
(714) 635-5370 • Fax: (714) 635-5372  
■ 5121 Stockdale Hwy., Suite 250 • Bakersfield, CA 93309  
(661) 396-7863 • Fax: (661) 396-7865  
■ 2350 West Shaw Avenue, Suite 118 • Fresno, CA 93711  
(559) 721-7488 • Fax (559) 721-7589

■ 3447 Atlantic Ave., Suite 215 • Long Beach, CA 90807  
(323) 206-4131 • Fax: (323) 206-4133  
■ 1605 West Olympic Blvd., Suite 509 • Los Angeles, CA 90015  
(213) 353-0782 • Fax: (213) 353-0792  
■ 16921 Parthenia Street, Suite 205, Northridge, CA 91343  
(818) 996-2015 • Fax: (818) 996-6531  
■ 1603 E. Palmdale Blvd., Suite E • Palmdale, CA 93550  
(661) 272-9397 • Fax: (661) 272-0181

As an example, Line item #8 indicated “5 Informational Training Presentations for DSS Staff” was a guaranteed cost line item, and FACTS calculated an assigned cost for these informational training presentations into its overall budget. FACTS also calculated a cost for all nine ancillary line items requested (of those nine, three were underlined as guaranteed).

Notwithstanding these clear guidelines, FACTS CEO, Andrea Foster received a phone call on Tuesday, October 25, 2022 from Laura Moreno, Fresno County DSS Program Manager, indicating she wished to change the requirements of the proposal. Ms. Moreno was placed on speaker, and notified that Katie Foster, COO, was also on the phone call. Ms. Moreno stated the County had decided to reverse all three of the guaranteed line items, indicating the County no longer wished to fund any of those “guaranteed” items, even though the County still expected the service may need to be provided, yet possibly at lesser quantities. These guaranteed line items included (but were not limited to) “Informational Training Presentations for DSS Staff (5 per year) and JobWISE Presentations to CalWORKs participants (24 per year).” The discussion left FACTS with an unclear idea of what was now requested, what would be funded, and what was now required.

During numerous additional October 25<sup>th</sup> phone conversations between FACTS CEO and COO, Ms. Moreno asked Andrea Foster if FACTS would accept zero dollars for those guaranteed line items. Ms. Foster hesitated because of the ambiguity it created. Ms. Foster indicated that the FACTS’ overall budget was calculated on the entire written RFP, including the guaranteed line items. Ms. Foster then asked if FACTS would then be able to negotiate the other items to assist in covering known costs. Ms. Moreno indicated “no”, and that those line items that had previously been guaranteed should be dropped or provided at no cost, and no increase in any other cost category would be allowed. (She later reversed that comment, indicating that “possibly” the County could increase the quantity of other ancillary items to offset some of the items now verbally being removed as a guaranteed item.)

FACTS was not only confused as to the budgetary differences in the written RFP and the verbal phone conversation, but explained that FACTS has been the current provider of this service since 2016, and is well aware of the costs associated with this contract. The last few contract years were not on a fee for service, but rather on an overall, annual reimbursement. That meant that FACTS was required to submit original invoices and receipts to the County on a monthly basis, itemizing exact costs for the service, and to be reimbursed at that exact rate (not to exceed the allowable budget maximum). FACTS bid only slightly higher (in this proposal) than what had been budgeted last year *due to the fact that the line items included new “guaranteed” items*. When reviewing FACTS’ Cost Proposal, the Review Committee obviously took all costs into consideration and scoring, and still recommended FACTS as the selected provider. However, DSS chose to ignore the Committee’s recommendation, and is now tentatively awarding the contract to the other proposer. (FACTS later determined that Brain Learning proposed \$0 for those guaranteed ancillary services, possibly indicating that they would not provide such services; thus leaving the Review Committee to indicate, “The Review Committee

identified this lack of cost for ancillary services as a weakness as they were concerned Brain Learning would be unable to sustain services at the proposed bid price.”) After phone calls with Laura Moreno, it appeared that the County was now reviewing those proposal-submitted differences in their requested guaranteed services, and reversed course as to what should be required and what should be deleted based on Brain Learning’s lack of response to the requested services. It appears that FACTS lost this award, in part, based on the County’s reversal of what was within the written RFP, and later changed verbally. This contradiction strongly influenced the final funding recommendation. In a letter from Sanja Bugay, dated November 29, 2020, it is indicated that Brain Learning would be selected for the award “...due to their capability of providing a similar level of service at a significantly lower cost.” That is clearly a contradiction to the written RFP.

In summary, the RFP was misleading in indicating some cost items would be guaranteed, and in fact requested (in a cost Proposal Excel grid) that the potential provider *provide a cost per service dollar amount*. FACTS clearly understood these “guaranteed” items were desired by the County based on the RFP and past experience on the contract, and FACTS put in a reasonable cost for service. There is clearly a contradiction in the RFP and later verbalized service request. That inconsistency put FACTS at a distinct disadvantage in the bid process.

- 2) **Procurement Errors:** RFP #23-006 clearly defined a bidding process that appeared appropriate, but then was not followed. That led to illegal non-conforming legal process in not providing all the bidders the same information, or evaluating potential providers in an equal or fair manner.

FACTS was put on the spot in phone conversations with Ms. Moreno, who was unclear as to what was now to be provided, and what would be eliminated. She initially asked if FACTS could remove all charges for the guaranteed items, stating they would no longer be necessary. FACTS was very concerned, as we were now being asked to reanalyze the budget and make on-the-spot changes (within an hour). Additionally, FACTS was fully aware that some of the guaranteed items listed in the RFP, were essential for successfully providing the service. Removing these items (adequate training of Job Specialists in how to refer, how to utilize reports, etc.) would be detrimental to the program, as these items are vital components for successfully assisting participants. When FACTS asked Ms. Moreno if other items could be increased (such as participant orientation video so that at minimum, participants would be able to be aware of FACTS services if FACTS was unable to provide training to the actual referral source) Ms. Moreno began to do what could only be described as “barter,” indicating she could be able to increase orientation videos to “a minimum of two, and possibly three.” These ambiguities further inhibited FACTS from providing an accurate and appropriate bid.

FACTS understands the need for negotiation when determining an award, however, the blurred verbal conversation of what would be included, what would be “possibly” allowed, and what would be eliminated was never clearly outlined, and was in direct

contradiction to the written RFP upon which FACTS reasonably relied at the onset of the process.

In a notice posted on Public Purchase, dated November 29, 2022 and signed by Sanja Bugay, the County of Fresno indicated, "...Brain Learning did not bill for requested ancillary services including...the presentation activities requested (WTW orientation videos, DSS staff trainings, and presentations to the JobWISE program). The Review Committee identified this lack of cost for ancillary services as a weakness, as they were concerned Brain Learning would be unable to sustain services at the proposed bid price..." Therefore, FACTS bid on the items listed as "guaranteed" and assumed these items were desired by the County. Yet, when Brain Learning merely dismissed these items, not indicating a price for them, it led the Review Committee to be concerned they would even be provided (and if provided, it would be at no cost). In direct contrast to the recommendations of the Review Committee, DSS still selected Brain Learning as the preferred provider. The process laid out by the RFP was clearly not followed and the actual process used prejudiced FACTS for accurately responding to the requested guaranteed cost line items. This is clearly a procurement error, and should have been plainly identified within the initial RFP, as opposed to the informal last-minute discussions with Ms. Moreno.

- 3) **Proposal Rating Discrepancies:** In the same posting on Public Purchase on November 29, 2022, it was indicated, "The Department's review of the Evaluation Tool completed by the Review Committee for each Proposal found that both vendors met the requirements of the RFP and there is no substantial programmatic benefit that offsets the significantly higher cost of the FACTS proposal (approximately 62% higher cost). The Department finds that the significant difference in cost between the two proposals was not supported by any significant difference in assessment quality for the requested services. The Department further determined that the weaknesses identified in Brain Learning's proposal by the majority of the Review Committee can be mitigated via conversations between the Department and Brain Learning."

In fact, after the conversations with Ms. Laura Moreno the price of service *excluding the contested ancillary services and the deleted guaranteed items would be less than 12%* of Brain Learning's per year, not 62%. The Committee based their analysis on faulty calculation of cost difference. To present that misleading 62% figure resulted in an unjust rating discrepancy.

Additionally, the service deliveries of both proposers is clearly in contrast. Brain Learning primarily works with evaluating children, as information and photos on its website are either all of children or overwhelmingly of children, with testimonials from adults, parents or schools about those child-centered services. In contrast, this contract award and specifications outlined in this solicitation is for "*adults, ages 18 to 59.*" The service and evaluation of adults is significantly different from the evaluation of a child. The CalWORKs requirements for adults mandates employment goals be addressed, strengths and barriers to adult financial self-sufficiency be documented, and comparisons of the academic requirements of an employment goal (versus the demonstrated skills of

the participant) be listed in the final report. FACTS is of the opinion that Brain Learning is not qualified to supply the RFP requirements, and that DSS is unaware of this highly relevant issue that should disqualify Brain Learning. A rating for the proposal submission of FACTS was clearly taken into consideration by members of the Review Committee, yet disregarded by DSS upon reversal of the recommendation. The recommendation of DSS to ignore these service delivery requirements for **adults puts not only FACTS, but also the County of Fresno and its CalWORKs recipients at a clear disadvantage.** The rankings of the Review Committee should stand, and actual rankings for experience, service delivery and performance should be upheld.

- 4) **Legality of the Procurement Context:** The RFP clearly states on page 14 of Proposal No. 23-006 “Service Location and Delivery – **The selected bidder shall: (B)....Have a central site in metro Fresno.**” Brain Learning does not list a site in Fresno County on its website, and clearly outlines its company’s contact us page that “Oakland, Elk Grove, Bakersfield, *Fresno, Modesto testing via virtual offices and school based testing.*” Brain Learning is clearly stating on its website (which can be viewed at <https://brainlearning.com/contact-brain-learning-2/>) that it conducts virtual assessments, rather than conducting assessments “in-person” as required by the RFP. No office location is listed within Fresno County, as its closest office location appears to be well outside Fresno County. This is a clear violation, as Brain Learning should not have been considered to have provided a responsive proposal that met the geographic requirements of the RFP. Having a central site in Fresno is a requirement, and a substantial programmatic benefit to the CalWORKs participants and taxpayers of Fresno County. FACTS has a fully stocked/staffed center in metro Fresno (since 2016) and has provided services at all rural locations requested. FACTS questions whether Brain Learning will undertake the substantial investment in a bricks and mortar location in central Fresno, as well as the ancillary equipment and staffing needed for such an endeavor.

As noted above, when Laura Moreno spoke with FACTS CEO Andrea Foster and COO Katie Foster on October 25<sup>th</sup>, she clearly indicated DSS would recommend FACTS be the selected provider based on phone conversations that day, with potential for negotiated clarification of final needs (and prices) in a contract that would be sent to FACTS. Ms. Moreno specifically asked how soon FACTS’ would be able to return any necessary contract revisions. Based on the conversation with Ms. Moreno, FACTS’ six years of service on the contract, and based on the Review Committee having recommended FACTS be the selected vendor, FACTS did not give notice to cancel or attempt to withdraw from its Fresno lease with its landlord. This will now result in a significant monetary loss to FACTS, as DSS has only provided a 30-day notice of cancellation of this long-standing contract. It is FACTS’ contention that FACTS is and was the sole responsive vendor to the RFP, and as the RFP stated, the provider to have a central site in metro Fresno. DSS apparently mislead FACTS; and DSS decided contrary to the Review Committee recommendations. FACTS has spent extensive dollars in establishing a leased facility, maintaining a current lease at a fixed cost, and maintaining a fully staffed center with personnel who live in Fresno. This has been accomplished by FACTS to fully meet the present and past criteria of the RFP, which has been listed as a mandated compliance in the last RFP’s. To ignore this critical component in the final award is

unjust and contrary to the RFP. It is unreasonable to expect FACTS to absorb the costs of a leased facility (with a 30-day notice of reversal of the recommended award) in order to give the contract to a mobile vendor in direct contradiction to the express requirement of the RFP. FACTS will be at a great monetary loss due to the mishandling of the RFP content, reversal of the Committee Review recommendations by DSS, and the procurement context of the RFP.

- 5) **Unfair competitive procurement:** Clearly the award for this service was unfair, as the process morphed verbally during discussions after issuance of the RFP, and was bent into a different shape or requirement than called for in the written RFP. That morphing introduced errors and unfairness into the procurement process. To propose removal of items, especially the proposed “guaranteed” items, and then to verbally “possibly” change those requirements after issuance of the RFP is biased and prejudicial.

Additionally, as noted below, competitive strengths of FACTS that were praised by the Review Committee were mislabeled as “weaknesses” by DSS.

Specifically, in the posted “Summary of Evaluation of RFP #23-006, DSS stated, one of FACTS primary “weaknesses” was that FACTS had “...a strong focus on vocational assessment. This was not included as a separate cost and was part of the FACTS’ overall proposal for assessment services. It was discussed that it seems the vendor assesses job skills first, rather than the requested LEP (Limited English Proficiency) and LDE (Learning Disability Evaluation) Assessments.”

It is important to note that FACTS is required by this contract to not only assess English proficiency and potential learning disabilities, but to *recommend and address viable employment goals within all LEP reports, and within most of the LDE reports* (with occasionally no employment goals needed for some of the referred LD population). First and primarily, FACTS clearly provides the LEP and LDE assessment service requested and documented within each report. However, FACTS must review job skills for all referred clients in order to make these employment recommended goals. FACTS provides this service *at no additional cost*, and was clearly seen as a tremendous asset by the Review Committee. FACTS has worked exceedingly well with the County of Fresno for years, and has verbally been told repeatedly how well this vocational assessment service has been provided, and that FACTS has served the County better than any previous provider of these services. FACTS has collected feedback forms from Job Specialists within the County of Fresno for all six years of the contract, with an over 98% positive feedback ranking on all provided services. However, DSS reversed this impression, labeling a review of the referred client’s job skills as a “primary weakness” stating “...the vendor provided services that were not requested...” Clearly, if FACTS is required to recommend employment goals, an assessment of employment skills as related to client stated interests is required. To provide this at no extra cost should be viewed as a very strong asset.

Additionally, on page 12 of the RFP, under SCOPE OF WORK, it indicates “The County of Fresno, on behalf of the Department of Social Services (DSS), is soliciting proposals

from qualified bidders to provide specialized assessments for Limited English Proficiency (LEP), Learning Disability Evaluations (LDE), and Independent Assessments (third-party review) to CalWORKs WTW participants, *in accordance with the Welfare and Institutions Code (WIC) Division 9, Part 3, Chapter 2, Article 3.2, sections 11325.25 and 11325.4.* This code specifically states that when assessing and recommending employment goals for participants, the provider must address “... **6) Physical limitations or mental conditions that limit the participant’s ability for employment or participation in welfare-to-work activities...**” FACTS is well trained on Workers Compensation injury cases, and regularly discusses the physical tolerances needed for any employment goal with the participant prior to placing employment recommendations within its final report. FACTS particularly reviews the physical demands of any recommended employment goal that requires over 50 pounds of lifting or standing in excess of 80% of the work day with those participants selecting employment goals have such requirements. Additionally, if the participant reveals any type of injury (i.e. hand, leg, back) FACTS will discuss the job demands with the participant, report such within the report, and either recommend employment goals suitable for the participant or report the barrier to the referring Job Specialist.

This short conversation and resultant report fulfills the requirement of the California Welfare and Institutions Code, and more importantly, assists the County in avoiding placing participants in jobs that are clearly contraindicated by physical restrictions and/or previous injuries. This conversation typically is less than five minutes, but allows the participant to understand the physical tolerances needed for that occupation. FACTS provide this service at no extra cost in an attempt to not only ethically ascertain whether the employment goals listed within its reports are appropriate, but *to fulfill the mandates of the written and required Scope of Work documented within the RFP.*

However, within the “Summary of Evaluation” this free, mandated service is ironically discussed as, “...One of the *primary weaknesses* identified was that the vendor provided services that were not requested, such as testing for physical tolerances and work tolerances, as well as addressing barriers that the Department’s staff should be addressing with clients.” This short conversation with the participant (that is a mandate of CalWORKs) was misconstrued to become an unnecessary service and a weakness of FACTS’ proposal. That is clearly prejudicial, and thus this resulted in an unfair competitive procurement process.

In summary, the Review Committee members, who were allowed to scrutinize both proposals, clearly selected and recommended FACTS as the provider to receive this award, (letter of November 20, 2022). FACTS is the vendor that can best provide these services and was selected after a careful and thorough inspection, in part based on six years of history on this contract. Within DSS’ funding recommendation letter to Purchasing, it was indicated, “...The committee was impressed with FACTS’ years of experience serving the target population in Fresno County. It was agreed FACTS has a complete understanding of the target population. Their services were considered accessible to clients, with information provided on relevant bus routes and a central office location in Fresno. In addition, staff had strong vocational skills backgrounds, which is helpful in providing robust assessment and evaluation services...” The Review Committee

further indicated, "After a thorough review and discussion, the Review Committee ranked FACTS higher than Brain Learning, with 3 of 5 reviews ranking FACTS as their chosen proposal during both ranking meetings."

FACTS met all requested items of bidding for guaranteed listed items, had (and still maintains) a central office in metro Fresno, provides all services outlined within the RFP, fulfills the mandated scope of service CalWORKs requirements, is currently the largest provider of LEP and LDE services in the state of California, and placed a bid at a reasonable cost as documented by submitted invoices to the County over many months. Although the Review Committee carefully took all these items into consideration, and recommended this award to FACTS, Department of Social Services disregarded the recommendation and reversed that decision. It strongly appears this reversal was mainly due to costs, with all other experiential and service delivery criteria placed at a lesser consideration. A company that merely diminishes costs to a minimum, but obviously cannot compete for the service that taxpayers deserve, should not be chosen as the selected vendor. Moreover, as demonstrated above, the cost discrepancy was less than 12%, and was nowhere near the 62% identified in the selection letter. The relatively small higher contract cost when viewing the costs for LEP, LD, Independent Assessments, Interpreter Services and No Shows, and excluding the other ancillary services (certainly not the 62%), should not be the deciding factor given the multitude of deliverables that are critical components of this proposal; and on which FACTS clearly has and will outperform Brain Learning in ALL respects. The statement in the funding recommendation indicating, "...the Department further determined that the weaknesses identified in Brain Learning's proposal by the majority of the Review Committee can be mitigated via conversations between the Department and Brain Learning" is extremely misleading, as Brain Learning shows *no experience* in meeting the requirements of this RFP via Welfare and Institutions Code (WIC) Division 9, Part 3, Chapter 2, Article 3.2, sections 11325.25 and 11325.4, addressing employment goals of adults, or identifying strengths and barriers to participants seeking self-sufficiency via these services.

Further, on page 18 of the solicitation it is indicated, "All proposals will be evaluated using the same criteria. **While cost is important, other factors are also significant, and the County may not select the lowest cost proposal. The objective is to choose the proposal that offers the highest quality services and will best achieve the County's goals and objectives within a reasonable budget...**" FACTS services are clearly superior in meeting the County's goals for this solicitation, is the largest provider of this service in the state of California, offers a more substantial programmatic benefit than Brain Learning, and was identified as such by the Review Committee. In reversing the recommendations of the Review Committee, DSS acted based on contractions, procurement errors, proposal rating discrepancies, legality of procurement context and inappropriate competitive procurement regarding the RFP process.

Lastly, FACTS has always had an excellent reputation in Fresno County and within the state of California. This RFP is flawed and if the tentative award notice is allowed to stand, it will cast a very negative light on FACTS' reputation. Further, FACTS has built an infrastructure throughout Fresno County which has been expensive and has taken years to construct. The loss of this contract will have a devastating impact upon that infrastructure; and FACTS again emphasizes its skepticism over Brain Learning's commitment to undertaking this expensive aspect of the deliverables.

FACTS additionally immediately requests all Review Committee and DSS scoring, weighted values for each category and notes be immediately forwarded to FACTS, and that answers to the issues contained in this letter be addressed. If you do intend to reject this appeal via a written response to FACTS, FACTS will exercise its right to file an appeal to the County Administrative Office.

Thank you for considering the foregoing and we trust that you will find that FACTS is the only viable alternative for successfully fulfilling the requirement of the contract at issue.

Sincerely,



Andrea Foster, CEO  
Foster Assessment Center & Testing Service, Inc.



# County of Fresno

INTERNAL SERVICES DEPARTMENT

Facilities • Fleet • Graphics • Purchasing • Security • Technology

December 21, 2022

## Sent via US mail and E-mail

Andrea Foster, CEO  
Foster Assessment Center & Testing Service, Inc. (FACTS)  
516 Pennsfield Place, Suite 108  
Thousand Oaks, CA 91360  
E-mail:AndreaFoster@FosterAssessment.com

RE: Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments.

Dear Ms. Foster:

This letter is the response of the Purchasing Department (Purchasing) of the County of Fresno (County) to Foster Assessment Center & Testing Service, Inc.'s (FACTS) appeal letter, dated December 5, 2022.

The County appreciates all the work that FACTS has provided to the County under its current agreement, as well as the work FACTS put into preparing its proposal for the proposed agreement.

FACTS appeals the Department of Social Services' (DSS) recommendation to issue a tentative award of the proposed agreement for the above-mentioned Request for Proposal (RFP) for Welfare-to-Work (WTW) Specialized Assessments to Brain Learning. The appeal requests that Purchasing instead uphold the RFP Evaluation Team's (Evaluation Team) recommendation to the DSS concerning this proposed agreement.

On November 29, 2022, the DSS made a recommendation of tentative award of the proposed agreement to Brain Learning Psychological Corporation (Brain Learning), which is a recommendation by the DSS to the Board of Supervisors (Board) that the Board should award the proposed agreement for these services to Brain Learning. This recommendation for "tentative award" to Brain Learning is not a final County decision, and the County's decision to award the proposed agreement is made only by the Board.

The DSS found that both vendors met the requirements of the RFP, but that there was no substantial benefit in the services offered by FACTS that offset the substantially higher cost of the FACTS proposal as compared with Brain Learning's proposal. FACTS states that "it strongly appears that this reversal was mainly due to costs, with other experiential and service delivery criteria placed at a lesser consideration, and quotes a line from the RFP that says, "While cost is important, other factors are also significant, and the County may not select the lower cost proposal. The objective is to choose the proposal that offers the highest quality services and will best achieve the County's goals and objectives within a reasonable budget."

Internal Services / 333 W. Pontiac Way / Clovis, California 93612 / (559) 600-6200 / Fax (559) 600-5927

*\* The County of Fresno is an Equal Employment Opportunity Employer \**

Andrea Foster, CEO

Foster Assessment Center & Testing Service, Inc. (FACTS)

RE: Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments

December 21, 2022

Page 2

I have reviewed the RFP and the claims made by FACTS, and all procurement requirements were followed. Both proposals were responsive. Based on their proposals submitted to the County's Public Purchase, I believe that both vendors are qualified for the proposed agreement, and offer comparable and satisfactory service delivery. While cost is not the only criterion in the DSS's decision, it is certainly an important criterion, as is the case with any agreement involving public funds. The estimated compensation cost proposed by FACTS to perform these services is approximately 48% higher than the estimated maximum compensation cost proposed by Brain Learning. Specifically, FACTS proposed to provide these services, including all Optional Services, at an estimated maximum compensation amount of \$1,480,590, while Brain Learning proposed to provide these services, including all Optional Services, at an estimated maximum compensation amount of \$906,450, which means that the cost of FACTS' proposal was \$574,140 higher than the cost of Brain Learning's proposal.

Significantly, FACTS's proposal listed a charge for no-shows or cancellations, ranging from \$325 to \$385 per cancellation over the term of the proposed agreement, and Brain Learning proposed no charge for no-shows or cancellations. The DSS stated a preference in the RFP for no cost no-shows or cancellations in the RFP (RFP, Exhibit A), because the DSS wants the contracted vendor to have an incentive to get its clients to go to their office for assessments.

As discussed, below, the DSS staff contacted FACTS to correct an error and to verify whether FACTS would hold the rest of its proposal pricing if the Optional Services (and the pricing submitted for those Optional Services) were removed. However, this discussion did not change the outcome.

Brain Learning was identified by the Evaluation Team as capable and qualified to provide services, and two of the five Evaluation Team members recommended Brain Learning's proposal over FACTS's proposal. The Evaluation Team made its recommendation to DSS, but DSS believes that any differences in the services proposed by the two proposals were not justified by the overall greater cost of the FACTS proposal.

The recommendation by the Evaluation Team is merely a recommendation to the awarding department, the DSS, and the DSS has the right to not accept the recommendation of the Evaluation Team when deemed appropriate. In this situation, the DSS chose not to accept the Evaluation Team's recommendation because the DSS found no significant difference in the quality of services proposed by each vendor, and the services proposed by Brain Learning in its proposal would be provided at a significantly lower cost than the services proposed by FACTS in its proposal.

The County has a responsibility to make effective use of public funds. Although cost is not the only consideration, it is a large consideration when there is a significant difference in costs proposed by vendors.

Therefore, it appears that Brain Learning's proposal is more advantageous, overall, to the clients of the DSS and the County than FACTS' proposal.

#### **DETERMINATION OF FACTS's APPEAL**

Purchasing has considered each of FACTS's claims in its appeal, as discussed below, and has not found sufficient information that would justify overturning the DSS's recommendation of tentative award to the Board for the award of the proposed agreement to FACTS.

**Accordingly, FACTS's appeal is denied.**

Please see the bottom of this letter how FACTS may further pursue its appeal if it wishes to do so, and the deadline that applies.

**THE RFP**

Andrea Foster, CEO

Foster Assessment Center & Testing Service, Inc. (FACTS)

RE: Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments

December 21, 2022

Page 3

The purpose of the RFP was for the County, through the DSS, to obtain a cost-effective contractor to assess WTW participants, ages 18-59, for language barriers, learning or intellectual disabilities, and other physical, mental, and or psychological barriers that may prevent an individual from engaging in employment or educational training, with the goal of recommending appropriate accommodations.

This RFP is based on a fee-for-service model, where the DSS only pays for the services and assessments actually provided, instead of a flat fee arrangement. Accordingly, the maximum compensation amount of each proposal is "estimated," because the maximum compensation amount will partially depend on the number of participants, based on the rates proposed.

Exhibit A of the RFP is a Cost Proposal requesting each bidder's proposed fees (to be charged for the quantity actually provided) for nine different services. This page notes that the quantities listed are estimates based on current trends, but actual quantities may be higher or lower. Only the quantities that are known (and are not estimates) and are guaranteed are underlined on the table (Guaranteed Quantity). The items with Guaranteed Quantities are (Required) Item 5, Monthly activities, (Optional) Item 8, Informational Training Presentations for DSS Staff, and (Optional) Item 9, JobWISE Presentations.

### **Required Services**

The items on Exhibit A: Cost Proposal that were listed as required services are:

Item 1: Limited English Proficiency (LEP Report)

Item 2: Learning Disability Evaluation (LDE) Report

Item 3: Independent Assessment (Third Party Review) Report

Item 4: Interpreter Services (per minute rate)

Item 5: Monthly Activities: Prepare Monthly Invoice/Reports, Ongoing Communication with DSS (limit 12 per year)

Item 6: No-Shows/Cancellations (zero cost preferred).

### **Optional Services**

Three of the items on the chart in Exhibit A: Cost Proposal (Items seven through nine) were desired by the DSS, but optional, e.g., a bidder could elect not to offer those services (the "Optional Services"). These items were: a client orientation video, informational training presentations for the DSS staff, and JobWISE (Welfare-to-Work Job Readiness Program ) presentations (RFP, Exhibit A).

Item 7, Produce New or Update WTW Client Orientation Video, had an estimated quantity needed per year of one.

Item 8, Informational Training Presentations for the DSS Staff, had a Guaranteed Quantity needed per twelve months of five.

Item 9, JobWISE Presentations, had a Guaranteed Quantity needed per twelve months of 24 (twice per month).

Andrea Foster, CEO

Foster Assessment Center & Testing Service, Inc. (FACTS)

RE: Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments

December 21, 2022

Page 4

Although the quantity for Items 8 and 9 was known and was a Guaranteed Quantity, these items were still optional, and a bidder could choose not to provide these services at all, which was stated clearly at the top of Exhibit A in bold type.

### **THE SELECTION PROCESS**

The RFP was sent to contractors registered in Public Purchase and/or on a Bidder's List generated the DSS, which resulted in 45 potential bidders accessing the RFP documents, and two proposals were received (i.e., FACTS and Brain Learning) and deemed responsive by Purchasing and provided to the Evaluation Team for review.

The Evaluation Team was comprised mainly of County staff most knowledgeable of these services, and most qualified to evaluate these proposals. The County staff were from the DSS (a program manager, a social services program supervisor, and a staff analyst), and two members of the Evaluation Team were from outside the County. These outside members are experts in their field, and have specialized knowledge of these services.

The Evaluation Team reviewed and thoroughly discussed all proposals in detail. The Evaluation Team then ranked the proposals, based on how well each proposal met the requirements of the RFP. The Evaluation Team ranked FACTS higher than Brain Learning, with three of five reviewers ranking FACTS's proposal as their chosen proposal.

The Evaluation Team ranked FACTS higher than Brain Learning largely because FACTS, as the County's vendor since 2016, has years of experience servicing the target population in Fresno County. The Evaluation Team expressed concern that Brain Learning proposed to provide the Optional Services at no cost to the DSS, and expressed concern that Brain Learning would be unable to sustain services at the proposed bid price. The cost of the Optional Services proposed by FACTS over the potential term of the agreement was \$312,315. The Evaluation Team seemed to place more importance on each vendor's experience with County of Fresno clients and in-person service delivery than the total cost of each proposal.

Upon review and evaluation of the proposals received, the Evaluation Team made the final recommendation to the DSS (RFP p. 10).

When reviewing the proposals and the recommendation of the Evaluation Team, the DSS staff identified an error in item 5 in Exhibit A: Cost Proposal. Item 5 requested a cost for monthly reporting activities, such as submitting invoices. The DSS does not pay for invoicing activities in any of its agreements. FACTS had proposed a fee ranging from \$2,300 to \$2,660 over the term of the agreement, which was approximately 8% of the total of their total proposed maximum compensation amount. Brain Learning, on the other hand, proposed \$0 for this activity. FACTS's proposal stated that the contract bid pricing was only valid when the entire scope of all services was awarded, so Ms. Laura Moreno, the DSS Program Manager, contacted FACTS to find out if this proposed fee could be removed, to which FACTS agreed. Ms. Moreno was also preparing for options to provide to the Evaluation Team for the second review and ranking meeting, so she discussed with FACTS excluding the Optional Services (and the pricing proposed on those Optional Services), but ultimately, that discussion did not change the outcome.

The DSS administers the program, and the management of the DSS ultimately makes the decision which contractor would best achieve DSS's goals and objectives, and provide the best value for the DSS. The DSS did not agree with the Evaluation Team's recommendation to DSS. The DSS found that both vendors met the requirements of the RFP, but did not find a substantial benefit offered by FACTS that offsets the significantly higher estimated maximum compensation amount of the FACTS proposal, which was approximately 48% higher than the potential maximum compensation amount

Andrea Foster, CEO

Foster Assessment Center & Testing Service, Inc. (FACTS)

RE: Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments

December 21, 2022

Page 5

of the Brain Learning proposal. The DSS found this significant difference in cost between the two proposals was not supported by any significant difference in assessment quality for the requested services.

Accordingly, the DSS chose to not accept the recommendation of the Evaluation Team, and recommended tentative award of the agreement to Brain Learning.

### **FACTS'S APPEAL CLAIMS**

The claims made by FACTS were long and detailed, so I summarize each of FACTS's claims, in bold text, and provide Purchasing's response to each claim.

FACTS appeals the tentative award of the proposed agreement to Brain Learning and makes five claims:

- 1) **Alleged RFP Contradictions;**
- 2) **Alleged procurement errors;**
- 3) **Alleged proposal rating discrepancies;**
- 4) **Alleged legality of the procurement context; and**
- 5) **Alleged unfair competitive procurement.**

#### **Appeal Claim #1: Alleged RFP contradictions**

**FACTS alleges that there is an RFP contradiction because two items, Informational Training Presentations for the DSS Staff (Item #8) and JobWISE Presentations (item #9), were listed as optional in the RFP, but the Cost Proposal specified the quantity of these items needed as "guaranteed quantities," which means there would be no fluctuation in the quantity of these items needed.**

I disagree with FACTS's assertion; there were no RFP contradictions. The RFP stated at the top of Exhibit A that a bidder could elect not to provide the Optional Services. However, if a bidder elected to include the Optional Services in its proposal, the quantity needed of each Optional Services was either estimated (not known because the number of participants in the WTW program was estimated) or was a Guaranteed Quantity. FACTS alleges that this is an RFP contradiction, but it is not a contradiction. For example, Item 8, Informational Training Presentations for the DSS Staff, a desired but Optional Service, is guaranteed to be five presentations per year (RFP p. 13). Because it was an Optional Service, a bidder could also elect to exclude Item 8 from its bid altogether, but if a bidder elected to include Item 8 in its proposal, the quantity needed per year was five.

**FACTS alleges that the RFP was misleading because the RFP requested (in a cost Proposal Excel grid) that the potential provider give a cost per service dollar amount.**

FACTS alleges that it was misleading that the some of the Optional Services listed a Guaranteed Quantity, and requested a cost per service dollar amount, and appears to take issue with Brain Learning's listing of \$0 for these Optional Services. However, I do not believe that this portion of the RFP is misleading. The cost table in Exhibit A did include a space for the cost of each item, but, of course, the cost for that item could be \$0, which is what Brain Learning proposed. The fact that Brain Learning chose to offer the Optional Services at no cost (i.e., \$0) does not mean that the RFP was misleading in this respect.

Andrea Foster, CEO

Foster Assessment Center & Testing Service, Inc. (FACTS)

RE: Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments

December 21, 2022

Page 6

**FACTS alleges that it put in a reasonable cost for service for certain guaranteed items, and that there is a contradiction in the RFP and later discussion with Ms. Moreno.**

As explained above, Ms. Moreno discussed with FACTS whether the Optional Services (and the cost for each Optional Service proposed by FACTS) could be removed from FACTS's proposal, but ultimately, that discussion did not change the outcome. That discussion was consistent with the RFP, and in any event, does not mean that the RFP contains any contradiction.

\*\*\*

Conclusion regarding Appeal Claim #1: I find that there was not a contradiction in the RFP process, as alleged by FACTS.

#### **Appeal Claim #2: Alleged procurement errors**

**FACTS alleges that the RFP clearly defined a bidding process that appeared appropriate, but that Ms. Moreno's discussions with FACTS (after the after the proposals were submitted and after the Evaluation Team's first review and ranking) made it unclear what services were to be provided, and what would be eliminated, and were in contradiction to the written RFP, upon which FACTS reasonably relied at the onset of the process. FACTS alleges that this resulted in an illegal non-conforming legal process in not providing all the bidders the same information, or evaluating potential providers in an equal or fair manner.**

FACTS submitted its proposal, with an estimated maximum compensation amount of \$1,480,590, while Brain Learning submitted its proposal with estimated maximum compensation amount of \$906,450, which is a difference of \$574,140, or approximately 48%. As discussed above, after the proposals were submitted, and after the Evaluation Team completed its first review and ranking, but before the Evaluation Team's second review and ranking, and submission of the recommendation to DSS, Ms. Moreno contacted FACTS to correct the error of requesting pricing for invoicing. Ms. Moreno was preparing for options to provide to the Evaluation Team for the second review and ranking meeting. FACTS's proposal stated that the contract bid pricing was only valid when the entire scope of all services was awarded, so Ms. Moreno had to contact FACTS to verify whether FACTS's pricing would still be valid if the Optional Services were removed. This discussion did not change the outcome.

This discussion after the RFP proposals were submitted did not negate the appropriateness of the RFP bidding process, which was clear, and resulted in two responsive proposals, one from FACTS, and one from Brain Learning.

Based on cost, the Brain Learning proposal was more advantageous to the County, which has a responsibility to safeguard public funds.

Brain Learning was identified by the Evaluation Team as capable and qualified to provide services, and two of the five Evaluation Team members recommended Brain Learning's proposal over FACTS's proposal. Any differences in the services proposed by the two proposals (quality of reports, quality of customer service, proposed service models) were not supported by the overall substantially greater cost of the FACTS proposal. This was not an error in the procurement process.

\*\*\*

Andrea Foster, CEO

Foster Assessment Center & Testing Service, Inc. (FACTS)

RE: Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments

December 21, 2022

Page 7

Conclusion regarding Appeal Claim #2: I do not find any procurement errors that impacted the outcome of the tentative award, as alleged by FACTS.

### **Appeal Claim #3: Alleged proposal rating discrepancies**

**FACTS alleges a proposal rating discrepancy because the tentative award posting on Public Purchase listed FACTS's proposal maximum compensation amount as approximately 48% higher than the maximum compensation amount proposed by Brain Learning. FACTS alleges this is misleading, because FACTS discussed with the DSS staff the possibility of removing the Optional Services from its proposal, which FACTS alleges would have made its maximum compensation amount, excluding the Optional Services, only 12% higher than the maximum compensation amount proposed by Brain Learning.**

I disagree; these allegations do not constitute a proposal rating discrepancy. The estimated maximum compensation amount listed on FACTS's proposal is \$1,480,590, which is approximately 48% higher than Brain Learning's proposed estimated maximum compensation amount of \$906,450. So, FACTS was offering the entire range of services, both Required and Optional, and that is what the DSS considered.

Ms. Moreno discussed with FACTS removing the Optional Services, which would have still left the maximum compensation amount of FACTS's proposal 12% higher than that of Brain Learning (while not providing the Optional Services provided by Brain Learning). Because of these discussions, FACTS is alleging that the tentative award should have stated that the maximum compensation amount of FACTS's proposal was only 12% higher than the maximum compensation amount of Brain Learning's proposal.

However, FACTS is incorrect. These were merely discussions that might have reduced the scope of offered services and the cost to the DSS, and did not result in any agreement, or change in FACTS's proposal.

DSS wanted to obtain all of the services, including the Optional Services, and when comparing FACTS's overall proposal (with all Optional Services included) and Brain Learning's overall proposal (with all Optional Services included), the estimated maximum compensation amount of FACTS's proposal was correctly listed as 48% higher than the estimated maximum compensation amount of Brain Learning's proposal.

**FACTS also claims that there is a proposal rating discrepancy because Brain Learning primarily works with evaluating children, and this RFP is for adults, and FACTS claims that Brain Learning is not qualified to supply the RFP requirements.**

I disagree with this allegation. As stated in its proposal, Brain Learning's proposal states that it works with adults in similar WTW programs in other counties. The DSS found that both vendors met the requirements of the RFP and there was not a significant difference in assessment quality for the requested services. These are determinations to be made by the DSS.

\*\*\*

Conclusion regarding Appeal Claim #3: I do not find any substantiated proposal rating discrepancies, as alleged by FACTS.

### **Appeal Claim #4: Legality of the procurement context**

Andrea Foster, CEO

Foster Assessment Center & Testing Service, Inc. (FACTS)

RE: Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments

December 21, 2022

Page 8

**FACTS contends that because Brain Learning does not list a location in Fresno County on its website, as FACTS claims that this is a clear violation of the legality of the procurement context, and argues that Brain Learning should not have been considered to have provided a responsive proposal that met the geographic requirements of the RFP.**

FACTS's allegations do not assert any facts challenging the legality of the procurement context. Brain Learning met all the qualifications of the RFP, including two proposed testing sites in metro Fresno.

**FACTS also claims that due to its discussions with Ms. Moreno, it did not withdraw from its lease with its landlord, and FACTS will be at a great monetary loss due to the alleged mishandling of the RFP content, reversal of the Evaluation Team review recommendations by the DSS, and the procurement context of the RFP.**

As stated on page 10 of the RFP, the County of Fresno will not be held liable for any costs incurred by vendors in responding to this RFP, including leasing costs. Further, a "Notice of Award" is not an indication of County's acceptance of an offer made in response to this RFP. Only the Board has the authority to award an agreement for these services, and the County is not responsible for costs of leasing decisions made by FACTS prior to that award by the Board.

\*\*\*

Conclusion regarding Appeal Claim #4: I do not find that there was a violation of the procurement context, as alleged by FACTS.

#### **Appeal Claim #5: Alleged unfair competitive procurement**

**FACTS asserts that the award for this service was unfair, as the process morphed verbally during discussions after issuance of the RFP, and was bent into a different shape or requirement than called for in the written RFP, which FACTS alleges introduced errors and unfairness into the procurement process.**

I have reviewed these contentions and all procurement requirements were followed.

As stated above, the DSS staff contacted FACTS following submission of the proposals, but that discussion did not change the outcome of DSS's decision. And this discussion -- after the RFP proposals were submitted -- did not negate the appropriateness of the RFP bidding process, which was clear (and admittedly so by FACTS, as stated above, by FACTS in its appeal), and resulted in two responsive proposals.

Furthermore, the DSS staff contact with FACTS did not give Brain Learning any advantage.

**Additionally, FACTS asserts that certain competitive strengths of FACTS that were praised by the Evaluation Team were mislabeled as "weaknesses" by the DSS.**

In its recommendation, the Evaluation Team stated that one of the primary weaknesses of FACTS's proposal was that FACTS provided services that were not requested, such as testing for physical handicaps and work tolerances, as well as addressing barriers that the DSS's staff should be addressing with clients. The Evaluation

Andrea Foster, CEO

Foster Assessment Center & Testing Service, Inc. (FACTS)

RE: Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments

December 21, 2022

Page 9

Team also stated that FACTS's bid had a strong focus on vocational assessment, and expressed concern that FACTS might assess job skills first, rather than the requested LEP and LED assessments.

However, the focus on vocational assessment was not considered a weakness by the DSS, but rather, by one member of the Evaluation Team, who noted that vocational assessment was not the main service requested in the RFP, but LEP and LED assessments.

Also as noted in FACTS's appeal, other members of the Evaluation Team noted that the vocational skills background was also considered a strength by the panel. There were multiple members of the panel, who each held differing opinions. The Summary of Evaluation is intended to capture only highlights of the review process. Ultimately, the Evaluation Team met twice and recommended FACTS both times, in a split 3-to-2 decision.

\*\*\*

Conclusion regarding Appeal Claim #5: I find no substantiated claims of unfair competitive procurement, as alleged by FACTS.

**Board is scheduled to hear and act on the proposed agreement at its regular Board meeting on January 24, 2022.**

The DSS's recommendation of tentative award of the proposed agreement to Brain Learning to the Board is presently scheduled to be heard by the Board for its requested action at the Board's regular meeting on **January 24, 2023 at 9:30 am.**

**FACTS's Option to Continue the Appeal Process:**

FACTS has the option to continue the appeal process. To do so, a Letter of Appeal must be submitted in hardcopy form to the County Administrative Officer, Mr. Paul Nerland, 2281 Tulare St., Room 304, Fresno, CA 93721, **and** a copy of the letter in Microsoft Word Format must be submitted to me, the Purchasing Manager, at [Gcornuelle@fresnocountyca.gov](mailto:Gcornuelle@fresnocountyca.gov) via email.

If FACTS wishes to continue the appeal process, Mr. Nerland and the Purchasing Manager **must** receive the Letter of Appeal, at the respective hardcopy and email addresses stated above, **not later than 5:00 pm, January 3, 2022.**

FACTS's Letter of Appeal must clearly state, in specific terms, the reason(s) for the appeal.

\*\*\*

Thank you again in your interest in offering these important services to the County.

Sincerely,

Gary E. Cornuelle

Andrea Foster, CEO

Foster Assessment Center & Testing Service, Inc. (FACTS)

RE: Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments

December 21, 2022

Page 10

Purchasing Manager

December 5, 2022

Mr. Gary Cornuelle  
County of Fresno Purchasing  
333 West Pontiac Way  
Clovis, CA 93612

Re: Appeal of Tentative Award Notice, Proposal No. 23-006 Welfare-to-Work Specialized Assessments.

Dear Mr. Cornuelle:

Foster Assessment Center & Testing Service, Inc. (FACTS) hereby appeals the funding recommendation by DSS for Proposal 23-006 Welfare-to-Work Specialized Assessments, dated November 29, 2022. FACTS is requesting to uphold the RFP Review Committee's recommendation to award these services to Foster Assessment Center & Testing Service, Inc. (FACTS).

Please be advised this letter is our written notice of appeal, and is being submitted in writing within seven (7) working days after notification of the tentative recommendation for award. As noted in Proposal 23-006 (page 10), this letter is being submitted to the County of Fresno Purchasing, 333. West Pontiac Way, Clovis, CA 93612, and in word format to [gcornuelle@fresnocountyca.gov](mailto:gcornuelle@fresnocountyca.gov). This letter of appeal specifically addresses, per your guidelines, RFP contradictions, procurement errors, proposal rating discrepancies, legality of procurement context and inappropriate or unfair competitive procurement grievance regarding the RFP process.

FACTS is the sole current provider of this contract for the County of Fresno Department of Social Services, and has been since 2016. FACTS is requesting to uphold the Review Committee's decision, as they indicated, "The review committee met twice to complete the review process. After a thorough review and discussion, the review committee **ranked FACTS higher than Brain Learning**, with 3 of 5 reviewers ranking FACTS as their chosen proposal during both ranking meetings."

**FACTS is appealing the tentative award to Brain Learning due to several factors, including:**

- 1) **RFP Contradictions:** In Exhibit A: Cost Proposal, it is clearly written, "Postposed Cost per Instance of Service – The fees below should cover your agency's operational costs for the services. Underlined quantities can be guaranteed. Italicized quantities are estimates based on current trends, and actual quantities may be higher or lower."

*Administrative Office: 516 Pennsfield Place, Suite 108 • Thousand Oaks, CA 91360 • (805) 497-1685 • Fax: (805) 497-2525  
E-mail: ThousandOaks@FosterAssessment.com • Website: FosterAssessment.com*

■ 50 S. Anaheim Blvd., Suite 251 • Anaheim, CA 92805  
(714) 635-5370 • Fax: (714) 635-5372  
■ 5121 Stockdale Hwy., Suite 250 • Bakersfield, CA 93309  
(661) 396-7863 • Fax: (661) 396-7865  
■ 2350 West Shaw Avenue, Suite 118 • Fresno, CA 93711  
(559) 721-7488 • Fax (559) 721-7589

■ 3447 Atlantic Ave., Suite 215 • Long Beach, CA 90807  
(323) 206-4131 • Fax: (323) 206-4133  
■ 1605 West Olympic Blvd., Suite 509 • Los Angeles, CA 90015  
(213) 353-0782 • Fax: (213) 353-0792  
■ 16921 Parthenia Street, Suite 205, Northridge, CA 91343  
(818) 996-2015 • Fax: (818) 996-6531  
■ 1603 E. Palmdale Blvd., Suite E • Palmdale, CA 93550  
(661) 272-9397 • Fax: (661) 272-0181

As an example, Line item #8 indicated “5 Informational Training Presentations for DSS Staff” was a guaranteed cost line item, and FACTS calculated an assigned cost for these informational training presentations into its overall budget. FACTS also calculated a cost for all nine ancillary line items requested (of those nine, three were underlined as guaranteed).

Notwithstanding these clear guidelines, FACTS CEO, Andrea Foster received a phone call on Tuesday, October 25, 2022 from Laura Moreno, Fresno County DSS Program Manager, indicating she wished to change the requirements of the proposal. Ms. Moreno was placed on speaker, and notified that Katie Foster, COO, was also on the phone call. Ms. Moreno stated the County had decided to reverse all three of the guaranteed line items, indicating the County no longer wished to fund any of those “guaranteed” items, even though the County still expected the service may need to be provided, yet possibly at lesser quantities. These guaranteed line items included (but were not limited to) “Informational Training Presentations for DSS Staff (5 per year) and JobWISE Presentations to CalWORKs participants (24 per year).” The discussion left FACTS with an unclear idea of what was now requested, what would be funded, and what was now required.

During numerous additional October 25<sup>th</sup> phone conversations between FACTS CEO and COO, Ms. Moreno asked Andrea Foster if FACTS would accept zero dollars for those guaranteed line items. Ms. Foster hesitated because of the ambiguity it created. Ms. Foster indicated that the FACTS’ overall budget was calculated on the entire written RFP, including the guaranteed line items. Ms. Foster then asked if FACTS would then be able to negotiate the other items to assist in covering known costs. Ms. Moreno indicated “no”, and that those line items that had previously been guaranteed should be dropped or provided at no cost, and no increase in any other cost category would be allowed. (She later reversed that comment, indicating that “possibly” the County could increase the quantity of other ancillary items to offset some of the items now verbally being removed as a guaranteed item.)

FACTS was not only confused as to the budgetary differences in the written RFP and the verbal phone conversation, but explained that FACTS has been the current provider of this service since 2016, and is well aware of the costs associated with this contract. The last few contract years were not on a fee for service, but rather on an overall, annual reimbursement. That meant that FACTS was required to submit original invoices and receipts to the County on a monthly basis, itemizing exact costs for the service, and to be reimbursed at that exact rate (not to exceed the allowable budget maximum). FACTS bid only slightly higher (in this proposal) than what had been budgeted last year *due to the fact that the line items included new “guaranteed” items*. When reviewing FACTS’ Cost Proposal, the Review Committee obviously took all costs into consideration and scoring, and still recommended FACTS as the selected provider. However, DSS chose to ignore the Committee’s recommendation, and is now tentatively awarding the contract to the other proposer. (FACTS later determined that Brain Learning proposed \$0 for those guaranteed ancillary services, possibly indicating that they would not provide such services; thus leaving the Review Committee to indicate, “The Review Committee

identified this lack of cost for ancillary services as a weakness as they were concerned Brain Learning would be unable to sustain services at the proposed bid price.”) After phone calls with Laura Moreno, it appeared that the County was now reviewing those proposal-submitted differences in their requested guaranteed services, and reversed course as to what should be required and what should be deleted based on Brain Learning’s lack of response to the requested services. It appears that FACTS lost this award, in part, based on the County’s reversal of what was within the written RFP, and later changed verbally. This contradiction strongly influenced the final funding recommendation. In a letter from Sanja Bugay, dated November 29, 2020, it is indicated that Brain Learning would be selected for the award “...due to their capability of providing a similar level of service at a significantly lower cost.” That is clearly a contradiction to the written RFP.

In summary, the RFP was misleading in indicating some cost items would be guaranteed, and in fact requested (in a cost Proposal Excel grid) that the potential provider *provide a cost per service dollar amount*. FACTS clearly understood these “guaranteed” items were desired by the County based on the RFP and past experience on the contract, and FACTS put in a reasonable cost for service. There is clearly a contradiction in the RFP and later verbalized service request. That inconsistency put FACTS at a distinct disadvantage in the bid process.

- 2) **Procurement Errors:** RFP #23-006 clearly defined a bidding process that appeared appropriate, but then was not followed. That led to illegal non-conforming legal process in not providing all the bidders the same information, or evaluating potential providers in an equal or fair manner.

FACTS was put on the spot in phone conversations with Ms. Moreno, who was unclear as to what was now to be provided, and what would be eliminated. She initially asked if FACTS could remove all charges for the guaranteed items, stating they would no longer be necessary. FACTS was very concerned, as we were now being asked to reanalyze the budget and make on-the-spot changes (within an hour). Additionally, FACTS was fully aware that some of the guaranteed items listed in the RFP, were essential for successfully providing the service. Removing these items (adequate training of Job Specialists in how to refer, how to utilize reports, etc.) would be detrimental to the program, as these items are vital components for successfully assisting participants. When FACTS asked Ms. Moreno if other items could be increased (such as participant orientation video so that at minimum, participants would be able to be aware of FACTS services if FACTS was unable to provide training to the actual referral source) Ms. Moreno began to do what could only be described as “barter,” indicating she could be able to increase orientation videos to “a minimum of two, and possibly three.” These ambiguities further inhibited FACTS from providing an accurate and appropriate bid.

FACTS understands the need for negotiation when determining an award, however, the blurred verbal conversation of what would be included, what would be “possibly” allowed, and what would be eliminated was never clearly outlined, and was in direct

contradiction to the written RFP upon which FACTS reasonably relied at the onset of the process.

In a notice posted on Public Purchase, dated November 29, 2022 and signed by Sanja Bugay, the County of Fresno indicated, "...Brain Learning did not bill for requested ancillary services including...the presentation activities requested (WTW orientation videos, DSS staff trainings, and presentations to the JobWISE program). The Review Committee identified this lack of cost for ancillary services as a weakness, as they were concerned Brain Learning would be unable to sustain services at the proposed bid price..." Therefore, FACTS bid on the items listed as "guaranteed" and assumed these items were desired by the County. Yet, when Brain Learning merely dismissed these items, not indicating a price for them, it led the Review Committee to be concerned they would even be provided (and if provided, it would be at no cost). In direct contrast to the recommendations of the Review Committee, DSS still selected Brain Learning as the preferred provider. The process laid out by the RFP was clearly not followed and the actual process used prejudiced FACTS for accurately responding to the requested guaranteed cost line items. This is clearly a procurement error, and should have been plainly identified within the initial RFP, as opposed to the informal last-minute discussions with Ms. Moreno.

- 3) **Proposal Rating Discrepancies:** In the same posting on Public Purchase on November 29, 2022, it was indicated, "The Department's review of the Evaluation Tool completed by the Review Committee for each Proposal found that both vendors met the requirements of the RFP and there is no substantial programmatic benefit that offsets the significantly higher cost of the FACTS proposal (approximately 62% higher cost). The Department finds that the significant difference in cost between the two proposals was not supported by any significant difference in assessment quality for the requested services. The Department further determined that the weaknesses identified in Brain Learning's proposal by the majority of the Review Committee can be mitigated via conversations between the Department and Brain Learning."

In fact, after the conversations with Ms. Laura Moreno the price of service *excluding the contested ancillary services and the deleted guaranteed items would be less than 12%* of Brain Learning's per year, not 62%. The Committee based their analysis on faulty calculation of cost difference. To present that misleading 62% figure resulted in an unjust rating discrepancy.

Additionally, the service deliveries of both proposers is clearly in contrast. Brain Learning primarily works with evaluating children, as information and photos on its website are either all of children or overwhelmingly of children, with testimonials from adults, parents or schools about those child-centered services. In contrast, this contract award and specifications outlined in this solicitation is for "*adults, ages 18 to 59.*" The service and evaluation of adults is significantly different from the evaluation of a child. The CalWORKs requirements for adults mandates employment goals be addressed, strengths and barriers to adult financial self-sufficiency be documented, and comparisons of the academic requirements of an employment goal (versus the demonstrated skills of

the participant) be listed in the final report. FACTS is of the opinion that Brain Learning is not qualified to supply the RFP requirements, and that DSS is unaware of this highly relevant issue that should disqualify Brain Learning. A rating for the proposal submission of FACTS was clearly taken into consideration by members of the Review Committee, yet disregarded by DSS upon reversal of the recommendation. The recommendation of DSS to ignore these service delivery requirements for **adults puts not only FACTS, but also the County of Fresno and its CalWORKs recipients at a clear disadvantage.** The rankings of the Review Committee should stand, and actual rankings for experience, service delivery and performance should be upheld.

- 4) **Legality of the Procurement Context:** The RFP clearly states on page 14 of Proposal No. 23-006 “Service Location and Delivery – **The selected bidder shall: (B)....Have a central site in metro Fresno.**” Brain Learning does not list a site in Fresno County on its website, and clearly outlines its company’s contact us page that “Oakland, Elk Grove, Bakersfield, *Fresno, Modesto testing via virtual offices and school based testing.*” Brain Learning is clearly stating on its website (which can be viewed at <https://brainlearning.com/contact-brain-learning-2/>) that it conducts virtual assessments, rather than conducting assessments “in-person” as required by the RFP. No office location is listed within Fresno County, as its closest office location appears to be well outside Fresno County. This is a clear violation, as Brain Learning should not have been considered to have provided a responsive proposal that met the geographic requirements of the RFP. Having a central site in Fresno is a requirement, and a substantial programmatic benefit to the CalWORKs participants and taxpayers of Fresno County. FACTS has a fully stocked/staffed center in metro Fresno (since 2016) and has provided services at all rural locations requested. FACTS questions whether Brain Learning will undertake the substantial investment in a bricks and mortar location in central Fresno, as well as the ancillary equipment and staffing needed for such an endeavor.

As noted above, when Laura Moreno spoke with FACTS CEO Andrea Foster and COO Katie Foster on October 25<sup>th</sup>, she clearly indicated DSS would recommend FACTS be the selected provider based on phone conversations that day, with potential for negotiated clarification of final needs (and prices) in a contract that would be sent to FACTS. Ms. Moreno specifically asked how soon FACTS’ would be able to return any necessary contract revisions. Based on the conversation with Ms. Moreno, FACTS’ six years of service on the contract, and based on the Review Committee having recommended FACTS be the selected vendor, FACTS did not give notice to cancel or attempt to withdraw from its Fresno lease with its landlord. This will now result in a significant monetary loss to FACTS, as DSS has only provided a 30-day notice of cancellation of this long-standing contract. It is FACTS’ contention that FACTS is and was the sole responsive vendor to the RFP, and as the RFP stated, the provider to have a central site in metro Fresno. DSS apparently mislead FACTS; and DSS decided contrary to the Review Committee recommendations. FACTS has spent extensive dollars in establishing a leased facility, maintaining a current lease at a fixed cost, and maintaining a fully staffed center with personnel who live in Fresno. This has been accomplished by FACTS to fully meet the present and past criteria of the RFP, which has been listed as a mandated compliance in the last RFP’s. To ignore this critical component in the final award is

unjust and contrary to the RFP. It is unreasonable to expect FACTS to absorb the costs of a leased facility (with a 30-day notice of reversal of the recommended award) in order to give the contract to a mobile vendor in direct contradiction to the express requirement of the RFP. FACTS will be at a great monetary loss due to the mishandling of the RFP content, reversal of the Committee Review recommendations by DSS, and the procurement context of the RFP.

- 5) **Unfair competitive procurement:** Clearly the award for this service was unfair, as the process morphed verbally during discussions after issuance of the RFP, and was bent into a different shape or requirement than called for in the written RFP. That morphing introduced errors and unfairness into the procurement process. To propose removal of items, especially the proposed “guaranteed” items, and then to verbally “possibly” change those requirements after issuance of the RFP is biased and prejudicial.

Additionally, as noted below, competitive strengths of FACTS that were praised by the Review Committee were mislabeled as “weaknesses” by DSS.

Specifically, in the posted “Summary of Evaluation of RFP #23-006, DSS stated, one of FACTS primary “weaknesses” was that FACTS had “...a strong focus on vocational assessment. This was not included as a separate cost and was part of the FACTS’ overall proposal for assessment services. It was discussed that it seems the vendor assesses job skills first, rather than the requested LEP (Limited English Proficiency) and LDE (Learning Disability Evaluation) Assessments.”

It is important to note that FACTS is required by this contract to not only assess English proficiency and potential learning disabilities, but to *recommend and address viable employment goals within all LEP reports, and within most of the LDE reports* (with occasionally no employment goals needed for some of the referred LD population). First and primarily, FACTS clearly provides the LEP and LDE assessment service requested and documented within each report. However, FACTS must review job skills for all referred clients in order to make these employment recommended goals. FACTS provides this service *at no additional cost*, and was clearly seen as a tremendous asset by the Review Committee. FACTS has worked exceedingly well with the County of Fresno for years, and has verbally been told repeatedly how well this vocational assessment service has been provided, and that FACTS has served the County better than any previous provider of these services. FACTS has collected feedback forms from Job Specialists within the County of Fresno for all six years of the contract, with an over 98% positive feedback ranking on all provided services. However, DSS reversed this impression, labeling a review of the referred client’s job skills as a “primary weakness” stating “...the vendor provided services that were not requested...” Clearly, if FACTS is required to recommend employment goals, an assessment of employment skills as related to client stated interests is required. To provide this at no extra cost should be viewed as a very strong asset.

Additionally, on page 12 of the RFP, under SCOPE OF WORK, it indicates “The County of Fresno, on behalf of the Department of Social Services (DSS), is soliciting proposals

from qualified bidders to provide specialized assessments for Limited English Proficiency (LEP), Learning Disability Evaluations (LDE), and Independent Assessments (third-party review) to CalWORKs WTW participants, *in accordance with the Welfare and Institutions Code (WIC) Division 9, Part 3, Chapter 2, Article 3.2, sections 11325.25 and 11325.4.*” This code specifically states that when assessing and recommending employment goals for participants, the provider must address “... **6) Physical limitations or mental conditions that limit the participant’s ability for employment or participation in welfare-to-work activities...**” FACTS is well trained on Workers Compensation injury cases, and regularly discusses the physical tolerances needed for any employment goal with the participant prior to placing employment recommendations within its final report. FACTS particularly reviews the physical demands of any recommended employment goal that requires over 50 pounds of lifting or standing in excess of 80% of the work day with those participants selecting employment goals have such requirements. Additionally, if the participant reveals any type of injury (i.e. hand, leg, back) FACTS will discuss the job demands with the participant, report such within the report, and either recommend employment goals suitable for the participant or report the barrier to the referring Job Specialist.

This short conversation and resultant report fulfills the requirement of the California Welfare and Institutions Code, and more importantly, assists the County in avoiding placing participants in jobs that are clearly contraindicated by physical restrictions and/or previous injuries. This conversation typically is less than five minutes, but allows the participant to understand the physical tolerances needed for that occupation. FACTS provide this service at no extra cost in an attempt to not only ethically ascertain whether the employment goals listed within its reports are appropriate, but *to fulfill the mandates of the written and required Scope of Work documented within the RFP.*

However, within the “Summary of Evaluation” this free, mandated service is ironically discussed as, “...One of the *primary weaknesses* identified was that the vendor provided services that were not requested, such as testing for physical tolerances and work tolerances, as well as addressing barriers that the Department’s staff should be addressing with clients.” This short conversation with the participant (that is a mandate of CalWORKs) was misconstrued to become an unnecessary service and a weakness of FACTS’ proposal. That is clearly prejudicial, and thus this resulted in an unfair competitive procurement process.

In summary, the Review Committee members, who were allowed to scrutinize both proposals, clearly selected and recommended FACTS as the provider to receive this award, (letter of November 20, 2022). FACTS is the vendor that can best provide these services and was selected after a careful and thorough inspection, in part based on six years of history on this contract. Within DSS’ funding recommendation letter to Purchasing, it was indicated, “...The committee was impressed with FACTS’ years of experience serving the target population in Fresno County. It was agreed FACTS has a complete understanding of the target population. Their services were considered accessible to clients, with information provided on relevant bus routes and a central office location in Fresno. In addition, staff had strong vocational skills backgrounds, which is helpful in providing robust assessment and evaluation services...” The Review Committee

further indicated, "After a thorough review and discussion, the Review Committee ranked FACTS higher than Brain Learning, with 3 of 5 reviews ranking FACTS as their chosen proposal during both ranking meetings."

FACTS met all requested items of bidding for guaranteed listed items, had (and still maintains) a central office in metro Fresno, provides all services outlined within the RFP, fulfills the mandated scope of service CalWORKs requirements, is currently the largest provider of LEP and LDE services in the state of California, and placed a bid at a reasonable cost as documented by submitted invoices to the County over many months. Although the Review Committee carefully took all these items into consideration, and recommended this award to FACTS, Department of Social Services disregarded the recommendation and reversed that decision. It strongly appears this reversal was mainly due to costs, with all other experiential and service delivery criteria placed at a lesser consideration. A company that merely diminishes costs to a minimum, but obviously cannot compete for the service that taxpayers deserve, should not be chosen as the selected vendor. Moreover, as demonstrated above, the cost discrepancy was less than 12%, and was nowhere near the 62% identified in the selection letter. The relatively small higher contract cost when viewing the costs for LEP, LD, Independent Assessments, Interpreter Services and No Shows, and excluding the other ancillary services (certainly not the 62%), should not be the deciding factor given the multitude of deliverables that are critical components of this proposal; and on which FACTS clearly has and will outperform Brain Learning in ALL respects. The statement in the funding recommendation indicating, "...the Department further determined that the weaknesses identified in Brain Learning's proposal by the majority of the Review Committee can be mitigated via conversations between the Department and Brain Learning" is extremely misleading, as Brain Learning shows *no experience* in meeting the requirements of this RFP via Welfare and Institutions Code (WIC) Division 9, Part 3, Chapter 2, Article 3.2, sections 11325.25 and 11325.4, addressing employment goals of adults, or identifying strengths and barriers to participants seeking self-sufficiency via these services.

Further, on page 18 of the solicitation it is indicated, "All proposals will be evaluated using the same criteria. **While cost is important, other factors are also significant, and the County may not select the lowest cost proposal. The objective is to choose the proposal that offers the highest quality services and will best achieve the County's goals and objectives within a reasonable budget...**" FACTS services are clearly superior in meeting the County's goals for this solicitation, is the largest provider of this service in the state of California, offers a more substantial programmatic benefit than Brain Learning, and was identified as such by the Review Committee. In reversing the recommendations of the Review Committee, DSS acted based on contractions, procurement errors, proposal rating discrepancies, legality of procurement context and inappropriate competitive procurement regarding the RFP process.

Lastly, FACTS has always had an excellent reputation in Fresno County and within the state of California. This RFP is flawed and if the tentative award notice is allowed to stand, it will cast a very negative light on FACTS' reputation. Further, FACTS has built an infrastructure throughout Fresno County which has been expensive and has taken years to construct. The loss of this contract will have a devastating impact upon that infrastructure; and FACTS again emphasizes its skepticism over Brain Learning's commitment to undertaking this expensive aspect of the deliverables.

FACTS additionally immediately requests all Review Committee and DSS scoring, weighted values for each category and notes be immediately forwarded to FACTS, and that answers to the issues contained in this letter be addressed. If you do intend to reject this appeal via a written response to FACTS, FACTS will exercise its right to file an appeal to the County Administrative Office.

Thank you for considering the foregoing and we trust that you will find that FACTS is the only viable alternative for successfully fulfilling the requirement of the contract at issue.

Sincerely,



Andrea Foster, CEO

Foster Assessment Center & Testing Service, Inc.

**From:** [Cornuelle, Gary](#)  
**To:** [Melidonian, Leah](#)  
**Subject:** FW: Requested Information  
**Date:** Wednesday, January 11, 2023 9:39:53 AM  
**Attachments:** [Digital WJ IV Adaptation\\_Evalua8\\_LaForte\\_080722.pdf](#)

---

**From:** Andrea Foster <AndreaFoster@FosterAssessment.com>  
**Sent:** Thursday, January 5, 2023 11:50 AM  
**To:** Cornuelle, Gary <gcornuelle@fresnocountyca.gov>  
**Subject:** RE: Requested Information

Hello Mr. Cornuelle. Thank you, and yes we have seen your latest attachment.

In clarification of our request, it is our understanding that California State Rules and Code of Regulations governing evaluation of RFP's, weighted values will be awarded during evaluation criteria for certain administrative requirements to each bidder (experience, cost, location, service delivery, capacity to provide the requested service, etc.) and these weighted totaled values will result in which of the bids reflects the best response and thus award it the most points. We understand Purchasing may override these recommendations, but must hold strong non-biased criteria for such a reversal based on a mathematical and logical method(s).

We are, again, requesting the *weighted values assigned to each category within this RFP, in addition to the actual notes by each review committee member prior to final recommendation*. When we have acted as part of a review committee for other RFP's for Fresno County, we were instructed, in writing, to "Keep your comments professional. Please be mindful that the public and bidders can view the evaluation sheets." We are also aware there were five members on the review committee, and even though we requested such in a timely manner, we have only received one (combined) evaluation form.

The reason for this request is that we are certain cost does not outweigh the other mandated award criteria categories, and that this award should not have been overturned based on the cost differential.

As one example, after reading what you forwarded to us this week, we are certain the outlined provision of services by Brain Learning is not in compliance with the manufacturer's suggested method for testing Fresno County CalWORKs recipients. As the largest provider of this service, we strongly believe Brain Learning was non-responsive to this RFP, and awarding the contract to this firm may result in numerous legal actions from Fresno County customers that may be *virtually* evaluated and assessed. The review committee indicated that Brain Learning would provide virtual assessments, *and then* a meeting between the psychologist, Job Specialists and the client would take place *to discuss the results*. You are possibly not aware that all of these LD instruments/tests indicate (on manufacturing websites and in testing manuals) that in-person administration is the preferred method, and most (if not all) of

these tests, state “*the validity of virtual results are not available and are currently/still in process.*” Brain Learning is proposing testing with *non-validated norms for validated in-person testing instruments*, a criteria that should have made their proposal non-responsive.

We have contacted the manufacturer of the WAIS-IV, and were provided information from the test manufacturer themselves that questions the validity of virtual results. They have been upfront (obviously for legal purposes) and indicated that although a spectrum of options is available for administering the WAIS-IV (via telepractice and virtually), the *actual normative data* for this test were collected via in-person assessment – not virtually – thus the reason *virtual provision of the test is not currently recommended*. There are similar statements for both the WIAT-IV and more importantly, the Woodcock Johnson IV. Recently the WJIV test manufacturer specifically provided nationwide training on their learning disability testing, indicating that they are *in the process of gathering normative data for virtual learning disability testing*, stating valid virtual results are not yet available for all the tests customers may need, given their specific learning disability. In fact, when using their platform for virtual testing with the Woodcock Johnson, they state the norms are not yet virtually validated. They do not even provide validated normed scores for any of their oral directions testing, a learning disability demonstrated by numerous Fresno County customers we have tested in the past six years. Thus, the Woodcock Johnson manufacturer does *not even provide normative data or scoring for most of the virtual testing for the WJIV*, stating that they are still weighing the value of virtual testing, and “hope” to have “some” reliable normative values for testing the WJIV virtually by mid-2023 or later, depending on normative size sampling.

Other professionals have reviewed the problems and difficulties with virtual learning disability and LEP testing, stating the test manufacturers are still developing ethical virtual norms and analyzing data for equivalency with virtual data. As evidence, I have attached merely one recent (August 2022) training PowerPoints, this one by a Consultant ***hired by Riverside Publishing, the manufacturer of the WJIV***, regarding the pitfalls of using the Woodcock Johnson *for virtual determination of learning disabilities*. There are numerous other cautionary statements available for almost all tests suggested by Brain Learning. One of the main reasons Brain Learning had such a low cost is that they are cutting corners by testing in a method *not even suggested by the manufacturers of the tests they are administering* and suggesting their obtained scores are valid. This would ethically not be allowed by FACTS or any of our credentialed evaluators.

Any customer that struggles with online testing, non-person interface, utilizing a computer for timed testing, fluency (quick) responses and a true reflection of their skills will most likely not be found eligible for LD accommodations because their cognitive scores may not be high enough (with norms and grade levels that are currently based on in-person testing). Denying these CalWORKs customers a true reflection of their skills by clouding it with the numerous difficulties of virtual testing may deny those individuals most in need their legal right to accommodations. Additionally, any interruption of testing at all (a phone call, doorbell, a child, a dog barking, vision difficulties, etc.) should immediately invalidate that virtual test, and

ethically command the evaluator to cease that virtual evaluation, commence with other in-person tests that measure that same potential deficiency (hoping no other interruptions influence any other test). Those interruptions have not been quantified by the test manufacturers yet, and are not balanced into their normative values and grade levels. In fact, FACTS has been instructed by Los Angeles County, Ventura County, Orange County and numerous others that virtual learning disability testing **will not be allowed until *virtual validated, reliable norms are published by test manufacturers***. To say we are surprised Fresno County allowed this much of a diversion from the state-wide agreement for provision of these CalWORKs services is an understatement. Further, to realize that Brain Learning has no provision for in-person testing for those the vast majority of Fresno County's referred customers who need a validated and normed evaluation is certainly cause for serious concern. As far as we are aware, Fresno County would be the only county in the state of California that is going against test manufacturer regulations to allow virtual learning disability evaluations as their primary mode of evaluation for CalWORKs customers. This stance of allowing virtual evaluations as a primary mode is not at all recommended, especially with the tests Brain Learning outlined. It obviously places cost well above the ADA rights of CalWORKs customers.

Even if you do not award FACTS this contract and you do independently reverse the review committee's recommendations, we strongly suggest you consult with your legal department, as we feel there may be a number of potential lawsuits from Fresno County customers that are tested virtually, yet scored with in-person norms, and feel their rights have been violated. This procedure would not be ethically allowed by most evaluation professionals.

We understand that in hindsight, the review committee and Purchasing may not be aware of the recommended validated procedures for testing Fresno County customers, as that is not your intended forte. But it is our strength, and with this letter, the County is now aware that Brain Learning is *not testing via the preferred and/or utilizing **validated methods suggested by the actual test manufacturer (a requirement of the RFP)***. That flaw, in and of itself, leaves the County susceptible to numerous to ADA lawsuits and should now provide the County with enough information to deem Brain Learning as non-responsive.

As a side note, FACTS has been hired by other Counties in the state to act as a mediator and legal advisor when lawsuits regarding evaluation and assessment service have the potential to arise, and test results are in question. In fact, the County of Fresno has requested this service of FACTS under the contracted "third party" provision (when the customer disagrees with the recommendations of the Fresno County Job Specialist and/or the services recommended by Fresno County, FACTS will be deemed the mediator). Regarding this RFP, if a customer were to potentially bring these virtual test results into question, threatening the County with a lawsuit, FACTS would immediately advise the County to nullify any obtained results of LD *virtual testing prior to validated publication of virtual norming* by each test manufacturer, to provide an entirely different set of retesting, administered in person, and to *settle* any potential legal action that may have resulted by anyone questioning they have been provided all their rights under ADA and Title V, avoiding a costly court

battle.

This knowledge provided to you today, at minimum, should disqualify Brain Learning's proposal under the "service delivery" criteria. FACTS obviously has much stronger **capability** (current provider), **qualifications** (largest in the state), **location** (actual in-person testing facility in metro Fresno), and provides **additional services** (provides a wealth of free optional services if any particular customer demonstrates that need) – exactly the criteria noted on page 18 of your RFP.

We additionally believe that a reason Brain Learning may not have offered training to the County, offered orientations or other guaranteed and/or optional services is that many of these shortcomings may have been questioned, and/or it was seen as best not to bring these issues to light.

As the current provider for Fresno County for these services, as the largest provider in the state for these services, and as a past reviewing member of Fresno County's review committee for other RFP's, FACTS has proven we are the proposer that offers the highest quality services and will best achieved the County's goals and objectives within a reasonable budget (page 18 of the RFP). Regarding a "reasonable budget", please note you have access to every invoice FACTS submitted to the County for years, showing the **actual paper invoices and payments a professional evaluation company incurs to provide a quality service**. You will see that none of those costs are unnecessary (unless we cut corners, use non-validated tests, ignore the recommendations of the test manufactures, set secondary appointments with customers to "review results" knowing that many will not show (no show rates are extremely high) and staffing for those meetings will not be necessary, and provide less service to those CalWORKs participants putting their trust in the County's evaluation and assessment provisions). We believe the review committee understood these criteria, thus placing Brain Learning as a far second choice for this all-important service. We believe the committee was concerned with even one customer stating, "I do not test well on the computer" or "I don't have consistent internet access so the timing was off on my test" or "I don't know how to download the testing platforms needed." Most importantly, the differential between our annual costs, and that of Brain Learning, would be far less than *even one lawsuit* for lack of the proper evaluation provisions guaranteed to the taxpayers of Fresno County under ADA. We suggest you meet one more time with the review committee to discuss this information and your reversal of the tentative award.

We continue to request:

- each of the five review committee's RFP's ranking tools and/or any other documentation/note s pertaining to scoring of the RFP;
- weighted categories identifying the scoring for this particular RFP;
- the weighted scoring of FACTs vs. Brain Learning; and
- your final determination as to whether all appeal information sent by FACTS (including this letter) is enough to substantiate a reversal to the tentative award. If not, please inform us of all of our rights in regards to continuing the

appeal, as we believe the allowance of 72 hours (until 5:00 p.m. Friday, January 5<sup>th</sup>) is not in compliance with the California Code of Regulations.

If you do not plan on providing the above in a timely manner, with this additional documented knowledge, we respectfully request you reverse your tentative award to Brain Learning and deem FACTS as recommended provider for the tentative award. We have a proven record of professional performance with Fresno County, and have never put the County or CalWORKs participants at anywhere near the risks that will be taken if Purchasing's recommendation for the tentative award stands.

*Andrea Foster, CEO*

Andrea Foster, MA, CVE, ABVE, PVE, IPEC  
Certified Vocational Evaluator  
American Board of Vocational Experts  
Professional Vocational Evaluator  
International Psychometric Evaluation Certification

Foster Assessment Center & Testing Service, Inc.  
516 Pennsfield Place, Suite #108  
Thousand Oaks, CA 91360

Phone (805) 497-1685  
Fax (805) 497-2525

[www.FosterAssessment.com](http://www.FosterAssessment.com)

*HIPAA NOTICE: The documents accompanying this electronic transmission, or this transmission itself, may contain Protected Health Information. This information belongs to the sender and is legally privileged. The information is intended only for the use of the individual or entity named above. If you are not the intended recipient, you are hereby notified that you may not disclose, copy, distribute or take action on the information in these documents. All such activities are strictly prohibited. If you have received this e-mail in error, please delete the e-mail immediately and empty your deleted items folder or take any steps necessary to ensure permanent deletion.*

---

**From:** Cornuelle, Gary <[gcornuelle@fresnocountyca.gov](mailto:gcornuelle@fresnocountyca.gov)>  
**Sent:** Tuesday, January 3, 2023 4:26 PM  
**To:** Andrea Foster <[AndreaFoster@FosterAssessment.com](mailto:AndreaFoster@FosterAssessment.com)>  
**Subject:** RE: Requested Information

I believe you have seen this since you made a comment in your appeal. This document is on Public Purchase, but wanted to make sure you have seen it.

Gary

---

**From:** Cornuelle, Gary  
**Sent:** Tuesday, January 3, 2023 3:32 PM  
**To:** Andrea Foster <[AndreaFoster@FosterAssessment.com](mailto:AndreaFoster@FosterAssessment.com)>  
**Subject:** RE: Requested Information

I stand corrected. And I totally missed your request. Please see the attached and I can extend the deadline from today at 5pm to Friday at 5pm. This is all there is. One Eval tool for both proposals.

Thanks

---

**From:** Andrea Foster <[AndreaFoster@FosterAssessment.com](mailto:AndreaFoster@FosterAssessment.com)>  
**Sent:** Tuesday, January 3, 2023 3:10 PM  
**To:** Cornuelle, Gary <[gcornuelle@fresnocountyca.gov](mailto:gcornuelle@fresnocountyca.gov)>  
**Subject:** Requested Information

**CAUTION!!! - EXTERNAL EMAIL - THINK BEFORE YOU CLICK**

Dear Mr. Cornuelle:

In our Appeal of Tentative Award Notice, Proposal No. 23-006 Welfare-to-Work Specialized Assessments, dated December 5, 2022, we specifically requested all Review Committee and DSS scoring, weighted values for each category and notes be immediately forwarded to us in order to respond in a timely manner. It is our understanding it is our legal right to obtain that data prior to our response.

*Andrea Foster, CEO*

Andrea Foster, MA, CVE, ABVE, PVE, IPEC  
Certified Vocational Evaluator  
American Board of Vocational Experts  
Professional Vocational Evaluator  
International Psychometric Evaluation Certification

Foster Assessment Center & Testing Service, Inc.  
516 Pennsfield Place, Suite #108  
Thousand Oaks, CA 91360

Phone (805) 497-1685  
Fax (805) 497-2525

[www.FosterAssessment.com](http://www.FosterAssessment.com)

*HIPAA NOTICE: The documents accompanying this electronic transmission, or this transmission itself, may contain Protected Health Information. This information belongs to the sender and is legally privileged. The information is intended only for the use of the individual or entity named above. If you are not the intended recipient, you are hereby notified that you may not disclose, copy, distribute or take action on the information in these documents. All such activities are strictly prohibited. If you have received this e-mail in error, please delete the e-mail immediately and empty your deleted items folder or take any steps necessary to ensure permanent deletion.*



# County of Fresno

COUNTY ADMINISTRATIVE OFFICE  
**PAUL NERLAND**  
COUNTY ADMINISTRATIVE OFFICER

January 10, 2023

**Sent via US mail and E-mail to:** E-mail: [AndreaFoster@FosterAssessment.com](mailto:AndreaFoster@FosterAssessment.com)

Andrea Foster, CEO  
Foster Assessment Center & Testing Service, Inc. (FACTS)  
516 Pennsfield Place, Suite 108  
Thousand Oaks, CA 91360

**RE: Second Appeal of Tentative Award Notice, Request for Proposal No. 23-006 Welfare-to-Work Specialized Assessments.**

Dear Ms. Foster:

The County Administrative Office (CAO) is in receipt of Foster Assessment Center & Testing Service, Inc.'s (FACTS) second appeal letter, dated December 5, 2022, received by the CAO on Friday, January 6, 2023.

FACTS's second appeal letter is the same letter that FACTS sent to the County Purchasing Manager, Gary Cornuelle, on December 5, 2022 (First Appeal Letter). The email transmitting FACTS's second appeal letter also requests that I review an email chain between Purchasing Manager, Gary Cornuelle, and you, between the dates of January 3, 2023, through January 6, 2023, including an email from you to Gary Cornuelle dated January 5, 2023 that contains additional claims (Additional Claims; FACTS's second appeal letter and the Additional Claims are collectively referred to in this letter as the Second Appeal Letter).

FACTS appeals the Department of Social Services' (DSS) recommendation to issue a tentative award of the proposed agreement for the above-mentioned Request for Proposal (RFP) for Welfare-to-Work (WTW) Specialized Assessments to Brain Learning. This appeal requests that I instead uphold the RFP Evaluation Team's (Evaluation Team) recommendation to the DSS concerning this proposed agreement.

On November 29, 2022, the DSS made a recommendation of tentative award of the proposed agreement to Brain Learning Psychological Corporation (Brain Learning), which is a recommendation by the DSS to the Board of Supervisors (Board) that the Board should award the proposed agreement for these services to Brain Learning. This recommendation for "tentative award" to Brain Learning is not a final County decision, and the County's decision to award the proposed agreement is made only by the Board.

The DSS found that both vendors met the requirements of the RFP, but that there was no substantial benefit in the services offered by FACTS that offset the substantially higher cost of the FACTS proposal as compared with Brain Learning's proposal. FACTS claims that "it strongly appears that this reversal was mainly due to costs, with other experiential and service delivery criteria placed at a lesser consideration, and quotes a line from the RFP that says, "While cost is important, other factors are also significant, and the County may not select the lower cost proposal. The objective is to choose the proposal that offers the highest quality services and will best achieve the County's goals and objectives within a reasonable budget.""

I have considered each of FACTS's claims in its Second Appeal, and have not found sufficient evidence to overturn the DSS's recommendation of tentative award to the Board for the award of the proposed agreement to Brain Learning, or the Purchasing Manager's denial of FACTS's First Appeal Letter.

Both proposals were responsive. Based on their proposals submitted to the County's Public Purchase, and input from my staff, I believe that both vendors are qualified for the proposed agreement, and offer comparable and satisfactory service delivery. While cost is not the only criterion in the DSS's decision, it is certainly an important criterion, as is the case with any agreement involving public funds. The estimated compensation cost proposed by FACTS to perform these services is approximately 48% higher than the estimated maximum compensation cost proposed by Brain Learning. Specifically, FACTS proposed to provide these services, including all Optional Services, at an estimated maximum compensation amount of \$1,480,590, while Brain Learning proposed to provide these services, including all Optional Services, at an estimated maximum compensation amount of \$906,450, which means that the cost of FACTS' proposal was \$574,140 higher than the cost of Brain Learning's proposal.

Significantly, FACTS's proposal listed a charge for no-shows or cancellations, ranging from \$325 to \$385 per cancellation over the term of the proposed agreement, and Brain Learning proposed no charge for no-shows or cancellations. The DSS stated a preference in the RFP for no cost no-shows or cancellations in the RFP (RFP, Exhibit A), because the DSS wants the contracted vendor to have an incentive to get its clients to go to their office for assessments.

As discussed, below, the DSS staff contacted FACTS to correct an error in the RFP, and to verify whether FACTS would hold the rest of its proposal pricing if the Optional Services (and the pricing submitted for those Optional Services) were removed. However, this discussion did not change the outcome.

Brain Learning was identified by the Evaluation Team as capable and qualified to provide services, and two of the five Evaluation Team members recommended Brain Learning's proposal over FACTS's proposal. The Evaluation Team made its recommendation to DSS, but DSS believes that any differences in the services proposed by the two proposals were not justified by the overall greater cost of the FACTS proposal.

The recommendation by the Evaluation Team is merely a recommendation to the awarding department, the DSS, and the DSS has the right not to accept the recommendation of the Evaluation Team when deemed appropriate. In this situation, the DSS chose not to accept the Evaluation Team's recommendation because the DSS found no significant difference in the quality of services proposed by each vendor, and the services proposed by Brain Learning in its proposal would be provided at a significantly lower cost than the services proposed by FACTS in its proposal.

The County has a responsibility to make effective use of public funds. Although cost is not the only consideration, it is a large consideration when there is a significant difference in costs proposed by vendors.

Therefore, it appears that Brain Learning's proposal is more advantageous, overall, to the clients of the DSS and the County than FACTS's proposal.

#### **DETERMINATION OF FACTS'S SECOND APPEAL**

I have considered each of FACTS's claims in its Second Appeal, as discussed below, and have not found sufficient information that would justify overturning the DSS's recommendation of tentative award to the Board for the award of the proposed agreement to FACTS, or the Purchasing Manager's denial of FACTS's First Appeal Letter.

**Accordingly, FACTS's Second Appeal is denied.**

As discussed at the end of this letter, FACTS has the option to continue the appeal process by appealing my decision to the Board.

The County appreciates all the work that FACTS has provided to the County under its current agreement, as well as the work FACTS put into preparing its proposal for the proposed agreement. While FACTS's proposal had certain strengths, Brain Learning's proposal fulfilled the major requirements of the requested RFP, and is sufficient, and it is the opinion of DSS and my office that Brain Learning is expected to satisfactorily serve the needs of the County, and the public.

**THE RFP**

The purpose of the RFP was for the County, through the DSS, to obtain a cost-effective contractor to assess WTW participants, ages 18-59, for language barriers, learning or intellectual disabilities, and other physical, mental, and or psychological barriers that may prevent an individual from engaging in employment or educational training, with the goal of recommending appropriate accommodations.

This RFP is based on a fee-for-service model, where the DSS only pays for the services and assessments actually provided, instead of a flat fee arrangement. Accordingly, the maximum compensation amount of each proposal is "estimated," because the maximum compensation amount will partially depend on the number of participants, based on the rates proposed.

Exhibit A of the RFP is a Cost Proposal requesting each bidder's proposed fees (to be charged for the quantity actually provided) for nine different services. This page notes that the quantities listed are estimates based on current trends, but actual quantities may be higher or lower. Only the quantities that are known (and are not estimates) and are guaranteed are underlined on the table (Guaranteed Quantity). The items with Guaranteed Quantities are (Required) Item 5, Monthly activities, (Optional) Item 8, Informational Training Presentations for DSS Staff, and (Optional) Item 9, JobWISE Presentations.

**Required Services**

The items on Exhibit A: Cost Proposal that were listed as required services are:

Item 1: Limited English Proficiency (LEP Report)

Item 2: Learning Disability Evaluation (LDE) Report

Item 3: Independent Assessment (Third Party Review) Report

Item 4: Interpreter Services (per minute rate)

Item 5: Monthly Activities: Prepare Monthly Invoice/Reports, Ongoing Communication with DSS (limit 12 per year)

Item 6: No-Shows/Cancellations (zero cost preferred).

**Optional Services**

Three of the items on the chart in Exhibit A: Cost Proposal (Items seven through nine) were desired by the DSS, but optional, e.g., a bidder could elect not to offer those services (the "Optional Services"). These items were: a client orientation video, informational training presentations for the DSS staff, and JobWISE (Welfare-to-Work Job Readiness Program) presentations (RFP, Exhibit A).

Item 7, Produce New or Update WTW Client Orientation Video, had an estimated quantity needed per year of one.

Item 8, Informational Training Presentations for the DSS Staff, had a Guaranteed Quantity needed per twelve months of five.

Item 9, JobWISE Presentations, had a Guaranteed Quantity needed per twelve months of 24 (twice per month).

Although the quantity for Items 8 and 9 was known and was a Guaranteed Quantity, these items were still optional, and a bidder could choose not to provide these services at all, which was stated clearly at the top of Exhibit A in bold type.

### **THE SELECTION PROCESS**

The RFP was sent to contractors registered in Public Purchase and/or on a Bidder's List generated the DSS, which resulted in 45 potential bidders accessing the RFP documents, and two proposals were received (i.e., FACTS and Brain Learning) and deemed responsive by Purchasing and provided to the Evaluation Team for review.

The Evaluation Team was comprised mainly of County staff most knowledgeable of these services, and most qualified to evaluate these proposals. The County staff were from the DSS (a program manager, a social services program supervisor, and a staff analyst), and two members of the Evaluation Team were from outside the County. These outside members are experts in their field, and have specialized knowledge of these services.

The Evaluation Team reviewed and thoroughly discussed all proposals in detail. The Evaluation Team then ranked the proposals, based on how well each proposal met the requirements of the RFP. The Evaluation Team ranked FACTS higher than Brain Learning, with three of five reviewers ranking FACTS's proposal as their chosen proposal.

The Evaluation Team ranked FACTS higher than Brain Learning largely because FACTS, as the County's vendor since 2016, has years of experience servicing the target population in Fresno County. The Evaluation Team expressed concern that Brain Learning proposed to provide the Optional Services at no cost to the DSS, and expressed concern that Brain learning would be unable to sustain services at the proposed bid price. The cost of the Optional Services proposed by FACTS over the potential term of the agreement was \$312,315. The Evaluation Team seemed to place more importance on each vendor's experience with County of Fresno clients and in-person service delivery than the total cost of each proposal.

Upon review and evaluation of the proposals received, the Evaluation Team made the final recommendation to the DSS (RFP p. 10).

When reviewing the proposals and the recommendation of the Evaluation Team, the DSS staff identified an error in RFP item 5 in Exhibit A: Cost Proposal. Item 5 requested a cost for monthly reporting activities, such as submitting invoices. The DSS does not pay for invoicing activities in any of its agreements. FACTS had proposed a fee ranging from \$2,300 to \$2,660 over the term of the agreement, which was approximately 8% of the total of their total proposed maximum compensation amount. Brain Learning, on the other hand, proposed \$0 for this activity. FACTS's proposal stated that the contract bid pricing was only valid when the entire scope of all services was awarded, so Ms. Laura Moreno, the DSS Program Manager, contacted FACTS to find out if this proposed fee could be removed, to which FACTS agreed. Ms. Moreno was also preparing for options to provide to the Evaluation Team for the second review and ranking meeting, so she

discussed with FACTS excluding the Optional Services (and the pricing proposed on those Optional Services), but ultimately, that discussion did not change the outcome.

The DSS administers the program, and the management of the DSS ultimately makes the decision which contractor would best achieve DSS's goals and objectives, and provide the best value for the DSS. The DSS did not agree with the Evaluation Team's recommendation to DSS. The DSS found that both vendors met the requirements of the RFP, but did not find a substantial benefit offered by FACTS that offsets the significantly higher estimated maximum compensation amount of the FACTS proposal, which was approximately 48% higher than the potential maximum compensation amount of the Brain Learning proposal. The DSS found this significant difference in cost between the two proposals (\$574,140) was not supported by any significant difference in assessment quality for the requested services.

Accordingly, the DSS chose to not accept the recommendation of the Evaluation Team, and recommended tentative award of the agreement to Brain Learning.

### **FACTS'S SECOND APPEAL CLAIMS**

The claims made by FACTS in the First Appeal Letter were long and detailed, and were addressed by the Purchasing Manager, in his response to FACTS's First Appeal Letter. In your appeal to me, you forwarded the same First Appeal Letter, so my responses to your claims largely mirror those of the Purchasing Manager.

Below, I summarize each of FACTS's claims, in bold text, and provide my response to each claim.

FACTS's second appeal regarding DSS's recommendation regarding the tentative award of the proposed agreement to Brain Learning and makes five claims:

- 1) **Alleged RFP Contradictions;**
- 2) **Alleged procurement errors;**
- 3) **Alleged proposal rating discrepancies;**
- 4) **Alleged legality of the procurement context; and**
- 5) **Alleged unfair competitive procurement.**

#### **Appeal Claim #1: Alleged RFP contradictions**

**FACTS alleges that there is an RFP contradiction because two items, Informational Training Presentations for the DSS Staff (Item #8) and JobWISE Presentations (item #9), were listed as optional in the RFP, but the Cost Proposal specified the quantity of these items needed as "guaranteed quantities," which means there would be no fluctuation in the quantity of these items needed.**

#### **CAO Response:**

I disagree with FACTS's assertion; there were no RFP contradictions. The RFP stated at the top of Exhibit A that a bidder could elect not to provide the Optional Services. However, if a bidder elected to include the Optional Services in its proposal, the quantity needed of each Optional Services was either estimated (not known because the number of participants in the WTW program was estimated) or was a Guaranteed Quantity. FACTS alleges that this is an RFP contradiction, but it is not a contradiction. For example, Item 8, Informational Training Presentations for the DSS Staff,

a desired but Optional Service, is guaranteed to be five presentations per year (RFP p. 13). Because it was an Optional Service, a bidder could also elect to exclude Item 8 from its bid altogether, but if a bidder elected to include Item 8 in its proposal, the quantity needed per year was five.

**FACTS alleges that the RFP was misleading because the RFP requested (in a cost Proposal Excel grid) that the potential provider give a cost per service dollar amount.**

**CAO Response:**

FACTS alleges that it was misleading that the some of the Optional Services listed a Guaranteed Quantity, and requested a cost per service dollar amount, and appears to take issue with Brain Learning's listing of \$0 for these Optional Services. However, I do not believe that this portion of the RFP is misleading. The cost table in Exhibit A did include a space for the cost of each item, but, of course, the cost for that item could be \$0, which is what Brain Learning proposed. The fact that Brain Learning chose to offer the Optional Services at no cost (i.e., \$0) does not mean that the RFP was misleading in this respect.

**FACTS alleges that it put in a reasonable cost for service for certain guaranteed items, and that there is a contradiction in the RFP and later discussion with Ms. Moreno.**

**CAO Response:**

As explained above, Ms. Moreno discussed with FACTS whether the Optional Services (and the cost for each Optional Service proposed by FACTS) could be removed from FACTS's proposal, but ultimately, that discussion did not change the outcome. That discussion was consistent with the RFP, and in any event, does not mean that the RFP contains any contradiction.

\*\*\*

CAO Conclusion regarding Appeal Claim #1: I find that there was not any contradiction in the RFP process, as alleged by FACTS.

**Appeal Claim #2: Alleged procurement errors**

**FACTS alleges that the RFP clearly defined a bidding process that appeared appropriate, but that Ms. Moreno's discussions with FACTS (after the after the proposals were submitted and after the Evaluation Team's first review and ranking) made it unclear what services were to be provided, and what would be eliminated, and were in contradiction to the written RFP, upon which FACTS reasonably relied at the onset of the process. FACTS alleges that this resulted in an illegal non-conforming legal process in not providing all the bidders the same information, or evaluating potential providers in an equal or fair manner.**

**CAO Response:**

FACTS submitted its proposal, with an estimated maximum compensation amount of \$1,480,590, while Brain Learning submitted its proposal with estimated maximum compensation amount of \$906,450, which is a difference of \$574,140, or approximately 48%. As discussed above, after the

proposals were submitted, and after the Evaluation Team completed its first review and ranking, but before the Evaluation Team's second review and ranking, and submission of the recommendation to DSS, Ms. Moreno contacted FACTS to correct the error of requesting pricing for invoicing. Ms. Moreno was preparing for options to provide to the Evaluation Team for the second review and ranking meeting. FACTS's proposal stated that the contract bid pricing was only valid when the entire scope of all services was awarded, so Ms. Moreno had to contact FACTS to verify whether FACTS's pricing would still be valid if the Optional Services were removed. This discussion did not change the outcome.

This discussion after the RFP proposals were submitted did not negate the appropriateness of the RFP bidding process, which was clear, and resulted in two responsive proposals, one from FACTS, and one from Brain Learning.

Based on cost, the Brain Learning proposal was more advantageous to the County, which has a responsibility to safeguard public funds.

Brain Learning was identified by the Evaluation Team as capable and qualified to provide services, and two of the five Evaluation Team members recommended Brain Learning's proposal over FACTS's proposal. Any differences in the services proposed by the two proposals (quality of reports, quality of customer service, proposed service models) were not supported by the overall substantially greater cost of the FACTS proposal. This was not an error in the procurement process.

\*\*\*

CAO Conclusion regarding Appeal Claim #2: I do not find any procurement errors that impacted the outcome of the tentative award, as alleged by FACTS.

### **Appeal Claim #3: Alleged proposal rating discrepancies**

**FACTS alleges a proposal rating discrepancy because the tentative award posting on Public Purchase listed FACTS's proposal maximum compensation amount as approximately 62% higher than the maximum compensation amount proposed by Brain Learning. FACTS alleges this is misleading, because FACTS discussed with the DSS staff the possibility of removing the Optional Services from its proposal, which FACTS alleges would have made its maximum compensation amount, excluding the Optional Services, only 12% higher than the maximum compensation amount proposed by Brain Learning.**

#### **CAO Response:**

I disagree; these allegations do not constitute a proposal rating discrepancy. The estimated maximum compensation amount listed on FACTS's proposal is \$1,480,590, which is approximately 48% higher than Brain Learning's proposed estimated maximum compensation amount of \$906,450. So, FACTS was offering the entire range of services, both Required and Optional, and that is what the DSS considered.

Ms. Moreno discussed with FACTS removing the Optional Services, which would have still left the maximum compensation amount of FACTS's proposal 12% higher than that of Brain Learning (while not providing the Optional Services provided by Brain Learning). Because of these

discussions, FACTS is alleging that the tentative award should have stated that the maximum compensation amount of FACTS's proposal was only 12% higher than the maximum compensation amount of Brain Learning's proposal.

However, FACTS is incorrect. These were merely discussions that might have reduced the scope of offered services and the cost to the DSS, and did not result in any agreement, or change in FACTS's proposal.

DSS wanted to obtain all of the services, including the Optional Services, and when comparing FACTS's overall proposal (with all Optional Services included) and Brain Learning's overall proposal (with all Optional Services included), the estimated maximum compensation amount of FACTS's proposal was correctly listed as 48% higher than the estimated maximum compensation amount of Brain Learning's proposal.

**FACTS also claims that there is a proposal rating discrepancy because Brain Learning primarily works with evaluating children, and this RFP is for adults, and FACTS claims that Brain Learning is not qualified to supply the RFP requirements.**

**CAO Response:**

I disagree with this allegation. As stated in its proposal, Brain Learning's proposal states that it works with adults in similar WTW programs in other counties. The DSS found that both vendors met the requirements of the RFP and there was not a significant difference in assessment quality for the requested services. These are determinations to be made by the DSS.

\*\*\*

CAO Conclusion regarding Appeal Claim #3: I do not find any proposal rating discrepancies, as alleged by FACTS.

**Appeal Claim #4: Legality of the procurement context**

**FACTS contends that because Brain Learning does not list a location in Fresno County on its website, as FACTS claims that this is a clear violation of the legality of the procurement context, and argues that Brain Learning should not have been considered to have provided a responsive proposal that met the geographic requirements of the RFP.**

**CAO Response:**

FACTS's allegations do not assert any facts challenging the legality of the procurement context. Brain Learning met all the qualifications of the RFP, including two proposed testing sites in metro Fresno.

**FACTS also claims that due to its discussions with Ms. Moreno, it did not withdraw from its lease with its landlord, and FACTS will be at a great monetary loss due to the alleged mishandling of the RFP content, reversal of the Evaluation Team review recommendations by the DSS, and the procurement context of the RFP.**

**CAO Response:**

As stated on page 10 of the RFP, the County of Fresno will not be held liable for any costs incurred by vendors in responding to this RFP, including leasing costs. Further, a “Notice of Award” is not an indication of County’s acceptance of an offer made in response to this RFP. Only the Board has the authority to award an agreement for these services, and the County is not responsible for costs of leasing decisions made by FACTS prior to that award by the Board.

\*\*\*

CAO Conclusion regarding Appeal Claim #4: I do not find that there was a violation of the procurement context, as alleged by FACTS.

**Appeal Claim #5: Alleged unfair competitive procurement**

**FACTS asserts that the award for this service was unfair, as the process morphed verbally during discussions after issuance of the RFP, and was bent into a different shape or requirement than called for in the written RFP, which FACTS alleges introduced errors and unfairness into the procurement process.**

**CAO Response:**

I have reviewed these contentions and have conferred with my staff, and all procurement requirements were followed.

As stated above, the DSS staff contacted FACTS following submission of the proposals, but that discussion did not change the outcome of DSS’s decision. And this discussion – after the RFP proposals were submitted – did not negate the appropriateness of the RFP bidding process, which was clear (and admittedly so by FACTS, as stated above, by FACTS in its appeal), and resulted in two responsive proposals.

Furthermore, the DSS staff contact with FACTS did not give Brain Learning any advantage.

**Additionally, FACTS asserts that certain competitive strengths of FACTS that were praised by the Evaluation Team were mislabeled as “weaknesses” by the DSS.**

**CAO Response:**

In its recommendation, the Evaluation Team stated that one of the primary weaknesses of FACTS’s proposal was that FACTS provided services that were not requested, such as testing for physical handicaps and work tolerances, as well as addressing barriers that the DSS’s staff should be addressing with clients. The Evaluation Team also stated that FACTS’s bid had a strong focus on vocational assessment, and expressed concern that FACTS might assess job skills first, rather than the requested LEP and LED assessments.

However, the focus on vocational assessment was not considered a weakness by the DSS, but rather, by one member of the Evaluation Team, who noted that vocational assessment was not the main service requested in the RFP, but LEP and LED assessments.

Also as noted in FACTS's appeal, other members of the Evaluation Team noted that the vocational skills background was also considered a strength by the panel. There were multiple members of the panel, who each held differing opinions. The Summary of Evaluation is intended to capture only highlights of the review process. Ultimately, the Evaluation Team met twice and recommended FACTS both times, in a split 3-to-2 decision.

\*\*\*

CAO Conclusion regarding Appeal Claim #5: I do not find any unfair competitive procurement, as alleged by FACTS.

**Additional Claims:**

Your email, dated January 5, 2023, raised Additional Claims, which I will also consider. Because your email was lengthy, I will summarize your Additional Claims and address each one below:

**Additional Claim #1: Requirement for weighted values awarded during evaluation criteria**

**FACTS asserts that "California State Rules and Code of Regulations governing evaluation of RFP's" require that weighted values be awarded during evaluation criteria for certain administrative requirements to each bidder (experience, cost, location, service delivery, capacity to provide the requested service, etc.) and these weighted totaled values will result in which of the bids reflects the best response and thus award it the most points. FACTS requests the weighted values assigned to each category within this RFP, in addition to the actual notes by each review committee member prior to final recommendation. FACTS asserts that when FACTS has acted as part of a review committee for the County in the past, it has made such notes.**

**CAO Response:**

County staff requested that FACTS provide such referenced "California State Rules and Code of Regulations governing evaluation of RFP's," but FACTS did not produce any specific State rules or regulations. Further, the County is not aware of any such laws or regulations. Every public entity conducts RFP's differently, including using scoring, ranking, and using weighted scales. My staff informs me that, to their knowledge, the County has never used a weighted scale. The County has searched its records and has not located any notes by individual members of the Evaluation Team. My staff has produced the Evaluation Tools to you, which the Evaluation Team used to rank FACTS and Brain Learning.

Regardless of the scoring process, as discussed previously, the recommendation by the Evaluation Team is merely a recommendation to the awarding department, the DSS, and the DSS has the right not to accept the recommendation of the Evaluation Team when deemed appropriate. The DSS administers the program, and the management of the DSS ultimately makes the decision which contractor would best achieve DSS's goals and objectives, and provide the best value for the DSS. The DSS did not agree with the Evaluation Team's recommendation to DSS, and chose not to accept the Evaluation Team's recommendation because the DSS found no significant difference in the quality of services proposed by each vendor, and the services proposed by Brain

Learning in its proposal would be provided at a significantly lower cost than the services proposed by FACTS in its proposal.

\*\*\*

CAO Conclusion regarding Email Claim #1: I do not find any need for weighted values in the evaluation process, as alleged by FACTS.

**Additional Claim #2: Outlined provision of services by Brain Learning is not in compliance with the manufacturer's suggested method for testing County of Fresno CalWORKs recipients**

**FACTS claims that the Brain Learning's outlined provision of services is not in compliance with the manufacturer's suggested method for testing Fresno County CalWORKs recipients. FACTS claims that all of these instruments/tests indicate (on manufacturing websites and in testing manuals) that in-person administration is the preferred method, and most (if not all) of these tests, state "the validity of virtual results are not available and are currently/still in process." FACTS claims that Brain Learning is proposing testing with non-validated norms for validated in-person testing instruments, a criterion that should have made their proposal non-responsive. FACTS claims that one of the main reasons Brain Learning had such a low cost is that they are cutting corners by testing in a method not even suggested by the manufacturers of the tests they are administering and suggesting their obtained scores are valid. FACTS claims that no other county in the state of California has gone against test manufacturer regulations to allow virtual learning disability evaluations as their primary mode of evaluation for CalWORKs customers.**

**CAO Response:**

Brain Learning's response to the RFP states that Brain Learning provides both in person and remote testing, depending on the client's transportation barriers and the client's preferences. Brain Learning's proposal lists two in-person testing locations in metro Fresno within a block of public transportation stops. Brain Learning's proposal specifies that Brain Learning only uses validated testing instruments to assess aptitude/processing and achievement, and an online platform to assess vocational and personality traits of the client.

County staff, in conjunction with its contracted service provider, will evaluate the situation of each client and weigh all benefits and risks of different methods of testing instrument administration, and institute all necessary safeguards for the virtual administration of any test. Brain Learning's proposal specifically states that it will only use validated testing instruments.

To the extent that it is relevant, in regard to FACTS's assertion that no other county in the State of California has utilized virtual learning disability evaluation as their primary mode of evaluation for CalWORKs customers, my staff informs me that Brain Learning's response to the RFP lists current County clients for which it provides Learning Disability assessments for Welfare-to-Work participants including: County of Lake, County of Sonoma, and County of San Diego County, as a subcontractor.

\*\*\*

CAO Conclusion regarding Email Claim #2: I do not find any disqualifying information in your claims regarding Brain Learning's outlined provision of services, as alleged by FACTS.

**Additional Claim #3: FACTS claims that the differential between FACTS's annual costs is less than the costs of one lawsuit brought against the County due to improper evaluation provisions**

**FACTS claims that Brain Learning is not testing via the preferred method and/or utilizing validated methods suggested by the actual test manufacturer, leaving the County susceptible to numerous Americans with Disability Act lawsuits.**

**CAO Response:**

This claim is vague, and difficult to understand. Brain Learning's proposal specifies that Brain Learning has never been involved in a lawsuit or legal action.

As stated previously, FACTS proposed to provide these services, including all Optional Services, at an estimated maximum compensation amount of \$1,480,590, while Brain Learning proposed to provide these services, including all Optional Services, at an estimated maximum compensation amount of \$906,450, which means that the cost of FACTS' proposal was \$574,140 higher than the cost of Brain Learning's proposal. The County has a responsibility to make effective use of public funds. Although cost is not the only consideration, it is a large consideration when there is a significant difference in costs proposed by vendors.

\*\*\*

CAO Conclusion regarding Email Claim #3: I do not find that the threat of potential lawsuits if the County awards the agreement to Brain Learning, as alleged by FACTS, is sufficient to support overturning Purchasing's process.

**Additional Claim #4: FACTS claims that the information provided in the Additional Email Claims should disqualify Brain Learning's proposal under the "Service Delivery" criteria.**

**FACTS claims that FACTS has much stronger capability (current provider), qualifications (largest in the state), location (actual in-person testing facility in metro Fresno), and provides additional services (provides a wealth of free optional services if any particular customer demonstrates that need) – exactly the criteria noted on page 18 of your RFP.**

**CAO Response:**

The award criteria for the RFP includes the question, "Does the bidder describe locations and a service delivery plan that meet the requirements outlined in the "SCOPE OF WORK"?"

As stated previously, the County determined that both proposals were responsive. Based on their proposals submitted to the County's Public Purchase, and input from my staff, I believe that both vendors are qualified for the proposed agreement, and offer comparable and satisfactory service delivery. While FACTS's proposal had certain strengths, Brain Learning's proposal fulfilled the major requirements of the requested RFP, and is sufficient, and it is the opinion of DSS and my office that Brain Learning is expected to satisfactorily serve the needs of the County, and the public.

CAO Conclusion regarding Email Claim #4: I do not find that Brain Learning should be disqualified under the "Service Delivery" criteria, as alleged by FACTS.

\*\*\*

I appreciate FACTS' time and effort in addressing its concerns and bringing these concerns to my attention and the attention of the Purchasing Manager.

Based on my evaluation of FACTS' claims addressed in its Second Appeal Letter, I have concluded that the areas addressed in FACTS' second appeal letter and Additional Email Claims do not support overturning Purchasing's process, the DSS's decision for recommendation of tentative award of the proposed agreement under the RFP to Brain Learning, and the Purchasing Manager's denial of the First Appeal Letter.

As a result, FACTS's appeal to the CAO has been denied.

**FACTS's Option to Continue the Appeal Process:**

FACTS has the option to continue the appeal process. The DSS's recommendation of tentative award of the proposed agreement to Brain Learning to the Board is presently scheduled to be heard by the Board for its requested action at the Board's regular meeting on **January 24, 2023, at 9:30 am**.

While there is no express deadline to submit an appeal to the Board, the County should be notified in sufficient time prior the Board meeting so that the Clerk of the Board can have adequate time to prepare the agenda prior to the Board meeting.

Therefore, if FACTS intends to appeal this decision to the Board, please contact the Purchasing Manager, via email at [gcornuelle@fresnocountyca.gov](mailto:gcornuelle@fresnocountyca.gov), or by phone at (559) 600-7114 by **Tuesday, January 17, 2023, at 5:00 pm**, and he will help guide you through the process.

Sincerely,



Paul Nerland  
County Administrative Officer

cc: Gary Cornuelle, Purchasing Manager