



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Contract

Order Date: 04-02-2025

CORRECT ORDER NUMBER MUST APPEAR
ON ALL PACKAGES, INVOICES, AND
SHIPPING PAPERS. QUESTIONS
CONCERNING THIS ORDER SHOULD BE
DIRECTED TO THE DEPARTMENT
CONTACT.

Order Number:	CCT 0209 4307 FAR2400000001 3	Procurement Folder:	1361159
Document Name:	State of WV ACFR - Reporting Software	Reason for Modification:	Change Order No. 1 - to renew the contract
Document Description:	State of WV ACFR - Reporting Software		
Procurement Type:	Central Sole Source		
Buyer Name:	Tara Lyle		
Telephone:	(304) 558-2544		
Email:	tara.l.lyle@wv.gov		
Shipping Method:	Best Way	Effective Start Date:	2024-03-10
Free on Board:	FOB Dest, Freight Prepaid	Effective End Date:	2026-03-09

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: VS0000018214 FORVIS MAZARS LLP 910 E ST LOUIS ST STE 400 SPRINGFIELD MO 65806 2570 US Vendor Contact Phone: 513-621-8300 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>Not Entered</td><td></td><td></td></tr><tr><td>#3</td><td>Not Entered</td><td></td><td></td></tr><tr><td>#4</td><td>Not Entered</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	Not Entered			#3	Not Entered			#4	Not Entered			Requestor Name: Stephanie R Bailes Requestor Phone: (304) 558-4083 Requestor Email: stephanie.r.bailes@wv.gov 2025 FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	Not Entered																				
#3	Not Entered																				
#4	Not Entered																				

INVOICE TO	SHIP TO
ACCOUNTING SECTION DEPARTMENT OF ADMINISTRATION 2019 WASHINGTON ST E PO BOX 50121 CHARLESTON WV 25305-0121 US	FINANCIAL ACCOUNTING AND REPORTING SECTION DEPARTMENT OF ADMINISTRATION BLDG 17 2101 WASHINGTON ST E CHARLESTON WV 25305-1510 US

4/3/25 6C

Total Order Amount: \$75,000.00

Purchasing Division's File Copy

PURCHASING DIVISION AUTHORIZATION DATE: 4/2/25 ELECTRONIC SIGNATURE ON FILE	ATTORNEY GENERAL APPROVAL AS TO FORM DATE: 4/2/25 ELECTRONIC SIGNATURE ON FILE	ENCUMBRANCE CERTIFICATION DATE: 4-3-25 ELECTRONIC SIGNATURE ON FILE
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4/3/2025

Extended Description:

Change Order No. 01 is issued to renew the original contract according to all terms, conditions, prices and specifications contained in the original contract including all authorized change orders.

Effective date of renewal 03/10/2025 to 03/09/2026

Renewal Years Remaining: 3

No other Changes.

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	43231500	0.00000		0.000000	\$65,000.00
Service From	Service To	Manufacturer	Model No		
2024-03-10	2025-03-09				

Commodity Line Description: Business function specific software

Extended Description:

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	43231500	0.00000		0.000000	\$10,000.00
Service From	Service To	Manufacturer	Model No		
2025-03-10	2026-03-09				

Commodity Line Description: Business function specific software

Extended Description:



ERIC L. HOUSEHOLDER
CABINET SECRETARY

STATE OF WEST VIRGINIA
DEPARTMENT OF ADMINISTRATION
FINANCE DIVISION

SARAH H. LONG, CPA
CHIEF FINANCIAL OFFICER

February 27, 2025

Mr. Joe Stimac, Director
Forvis Mazars LLP
500 Virginia Street, East
Suite 800
Charleston, WV 25301

Re: Change Order #1 Renewal CCT: FAR2400000001 – FARS WV ACFR - Reporting Software

Dear Mr. Stimac,

The West Virginia Department of Administration Finance Division is offering to renew the original subject contract for WV ACFR - Reporting Software on CCT FAR2400000001 2024-2025, according to all terms, conditions, prices as shown on the Engagement Letter Cost Sheet and specifications contained in the original contract including all authorized change orders.

The effective dates of renewal are **March 10, 2025, through March 9, 2026**. If you agree to this renewal, please sign/date below and return to my attention. In addition, please include a copy of Forvis' **Certificate(s) of Insurance (COI)**, which is required to be part of this renewal.

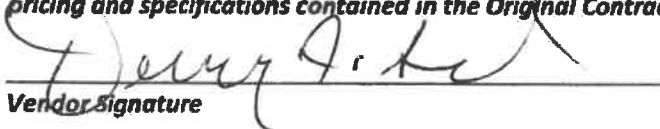
If you have any questions, please contact me at 304-558-6181.

Sincerely,



Sarah H. Long
Chief Financial Officer

Forvis LLP agrees to renew the subject contract for the period stated above and under the same terms, conditions, pricing and specifications contained in the Original Contract and any change orders thereto.



Vendor Signature

3/14/25
Date

PARTNER, FORVIS MAZARS, LLP, formerly known as FORVIS, LLP
Title

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West Virginia Secretary of State — Online Data Services

Business and Licensing

Online Data Services Help

Business Organization Detail

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Forvis Mazars, LLP

Organization Information								
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
LLP Limited Liability Partnership	7/18/2022		7/18/2022	Foreign	Profit			

Organization Information		
Business Purpose	Capital Stock	
Charter County	Control Number	9B20N
Charter State	Excess Acres	
At Will Term	Member Managed	
At Will Term Years	Par Value	
Authorized Shares	Young Entrepreneur	Not Specified

Addresses	
Type	Address
	5098 WASHINGTON ST. W., STE 407 CHARLESTON, WV, 25313-1561
Mailing Address	910 E. ST. LOUIS STREET SUITE 400 SPRINGFIELD, MO, 65806
Notice of Process Address	NATIONAL REGISTERED AGENTS, INC. 5098 WASHINGTON ST. W STE 407 CHARLESTON, WV, 25313
Principal Office Address	910 E. ST. LOUIS STREET SUITE 400 SPRINGFIELD, MO, 65806
Type	Address

Officers	
Type	Name/Address
General Partner	MICHAEL G. WOLFE 910 E. ST. LOUIS STREET SUITE 400 MO, 65806
Partner	MICHAEL G. WOLFE 910 E. ST. LOUIS STREET SUITE 400 MO, 65806
Type	Name/Address

Name Changes	
Date	Old Name
6/10/2024	FORVIS, LLP
Date	Old Name

Date	Amendment
6/10/2024	B4WV Name Change From: FORVIS, LLP
Date	Amendment

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For more information, please contact the Secretary of State's Office at 304-558-8000.

Wednesday, April 2, 2025 — 7:56 AM

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ERIC L. HOUSEHOLDER
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STATE OF WEST VIRGINIA
DEPARTMENT OF ADMINISTRATION
FINANCE DIVISION

SARAH H. LONG, CPA
CHIEF FINANCIAL OFFICER
MELODY DUKE, FINANCE DIRECTOR

MEMORANDUM

To: Whom it May Concern
From: Shelia Gray, Procurement Supervisor
Date: 04/01/2025
Re: Contract Renewal - CCT 0209 FAR2400000001

The WV DOA Finance Division was late on the renewal process for FORVIS MAZARS LLP due to Vendor not being in compliance with Vendor Registration and correcting the Vendor Name Change.

** vendor number remained
the same as the original
contract.*

*Backdate
app
10*



Lyle, Tara L <tara.l.lyle@wv.gov>

Re: CO#1 CCT FAR24*01

1 message

Gray, Shelia A <shelia.a.gray@wv.gov>

Wed, Apr 2, 2025 at 8:02 AM

To: "Lyle, Tara L" <tara.l.lyle@wv.gov>

Perfect, you're welcome.

Thanks for all your help.

On Wed, Apr 2, 2025 at 7:58 AM Lyle, Tara L <tara.l.lyle@wv.gov> wrote:

Looks good - I removed Melissa's name and put mine in.

It's submitted. Thanks for fixing all of the issues.

Tara

On Tue, Apr 1, 2025 at 10:12 AM Gray, Shelia A <shelia.a.gray@wv.gov> wrote:

I've corrected the Commodity Lines to reflect the current renewal and have added the Checklist and Late memo to the procurement folder. Do you want to review before I submit to you for review/approval?

On Tue, Apr 1, 2025 at 8:23 AM Lyle, Tara L <tara.l.lyle@wv.gov> wrote:

Thank you - back to you.

Tara

On Tue, Apr 1, 2025 at 8:21 AM Gray, Shelia A <shelia.a.gray@wv.gov> wrote:

Send this back to me and I will fix it :-)

On Tue, Apr 1, 2025 at 8:15 AM Lyle, Tara L <tara.l.lyle@wv.gov> wrote:

Good morning,

Couple of issues -

1. I need the compliance checklist for this renewal.
2. Why was the end date changed to 3/9/26 on Commodity Line 1? I think this should have remained 3/9/25.
3. Commodity Line 2 dates should be 3/10/25 to 3/9/2026 - same as renewal period.
4. Why were commodity lines 3 and 4 added? Can we delete and add when they renew?
5. Commodity Line 2 - accounting line needs to have some funds encumbered with PR05. The entire line now is showing PR07.
6. Probably going to need a backdate memo since the renewal period has some days on it.

Thanks,

Tara

COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

<i>Purchasing Division Use:</i> Buyer: <u>RL/01</u> Date: <u>4/2/25</u> Solicitation No. <u>CO#1 Renewal</u>	Agency: DOA Finance Procurement Officer Submitting Requisition: Shelia Gray Requisition No. CCT:0209ID:FAR2400000001 C.O. 1 PF No.: 1361159
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This checklist **MUST** be completed by a state agency's designated procurement officer and submitted with the Purchase Requisition to the Purchasing Division. The purpose of the checklist is to verify that an agency procurement officer has obtained and included required documentation necessary for the Purchasing Division to process the requisition without future processing disruptions. At the agency's preference, the agency **MUST** either submit the checklist by attaching it to the requisition's Header **OR** by placing it in the requisition's Procurement Folder.

FOR ALL SOLICITATION TYPES:

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
1	Specifications and Pricing Page included	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Use of correct specification template	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Use of correct requisition type [CRQS → CCT or CPO] or [CRQM → CMA]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Use of most current terms and conditions (www.state.wv.us/admin/purchase/TCP.pdf)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Maximum budgeted amount in wvOASIS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Suggested vendors in wvOASIS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Capitol Building Commission pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	Financing (Governor's Office) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	Fleet Management Division pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
10	Insurance requirements				
	Commercial General Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Automobile Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Workers' Compensation/Employer's Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Cyber Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Builder's Risk/Installation Floater	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Professional Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Office of Technology CIO pre-approval	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Treasurer's Office (banking) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FOR CHANGE ORDERS/RENEWALS:

1	Two-party agreement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Standard change order language	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Office of Technology CIO approval	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	Justification for price increases/backdating/other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	Bond Rider (Construction)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	Secretary of State Verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	State debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	Federal debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**The items pre-checked are required before a Purchase Requisition may be submitted to the Purchasing Division. Failure to complete and verify this documentation may result in rejection of the requisition back to the agency. It is up to the agency procurement officer to determine if pre-approvals, insurance, or other documentation is needed for the purchase. The referenced information below may be used to make this determination.*

For Purchasing Division Use Only:

I have reviewed the requisition identified above and find that it is sufficient to advertise publicly to the vendor community. My review does not preclude the possibility that the vendor community, or some other entity, will identify an area of concern; however, should such issues or concerns arise, they will be reviewed and addressed as may be appropriate.

Signature: 