



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

State of West Virginia Purchase Order

Order Date: 04-12-2024

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: | CPO 0506 2937 CME240000001 3 | Procurement Folder: | 1235822 |
| Document Name: | SITE MODIFICATIONS FOR LODOX EXERO-DR INSTALLATION | Reason for Modification: Change Order 1 To Issue Notice to Proceed | |
| Document Description: | SITE MODIFICATIONS FOR LODOX EXERO-DR INSTALLATION | | |
| Procurement Type: | Central Purchase Order | | |
| Buyer Name: | Crystal G Hustead | | |
| Telephone: | (304) 558-2402 | | |
| Email: | crystal.g.hustead@wv.gov | | |
| Shipping Method: | Best Way | Effective Start Date: | 2023-08-28 |
| Free on Board: | FOB Dest, Freight Prepaid | Effective End Date: | 2025-02-18 |

| VENDOR | | DEPARTMENT CONTACT | | | | | | | | | | | | | | | | | | | | | |
|---------------------------------|--|---|---------------------------|---------------------|------------------|---------------------|---------------|----|----|--------|---|----|-------------|--|--|----|-------------|--|--|----|-------------|--|--|
| Vendor Customer Code: | 000000174873 | Requestor Name: | Courtney M Buskirk | | | | | | | | | | | | | | | | | | | | |
| DOUGHERTY CO INC PO BOX 1828 | | Requestor Phone: | 304-352-4853 | | | | | | | | | | | | | | | | | | | | |
| CHARLESTON WV 25327-1828 US | | Requestor Email: | courtney.m.buskirk@wv.gov | | | | | | | | | | | | | | | | | | | | |
| Vendor Contact Phone: | 304-925-6664 | <div style="font-size: 48pt; font-weight: bold;">24</div> <div style="font-weight: bold;">FILE LOCATION _____</div> | | | | | | | | | | | | | | | | | | | | | |
| Extension: | | | | | | | | | | | | | | | | | | | | | | | |
| Discount Details: | | | | | | | | | | | | | | | | | | | | | | | |
| | <table border="1"> <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 | | |
| | Discount Allowed | | | Discount Percentage | Discount Days | | | | | | | | | | | | | | | | | | |
| #1 | No | 0.0000 | 0 | | | | | | | | | | | | | | | | | | | | |
| #2 | Not Entered | | | | | | | | | | | | | | | | | | | | | | |
| #3 | Not Entered | | | | | | | | | | | | | | | | | | | | | | |
| #4 | Not Entered | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | |

| INVOICE TO | SHIP TO |
|---|--|
| PURCHASING DIRECTOR 304-356-4116 HEALTH AND HUMAN RESOURCES BUREAU FOR PUBLIC HEALTH OFFICE CHIEF MEDICAL EXAMINER 619 VIRGINIA ST WEST CHARLESTON WV 25302 US | PURCHASING DIRECTOR 304-356-4116 HEALTH AND HUMAN RESOURCES BUREAU FOR PUBLIC HEALTH OFFICE CHIEF MEDICAL EXAMINER 619 VIRGINIA ST W CHARLESTON WV 25302 US |

4-24-24 61

| | |
|----------------------------|--------------|
| Total Order Amount: | \$895,000.00 |
|----------------------------|--------------|

Purchasing Division's File Copy

| | | |
|---|--|--|
| PURCHASING DIVISION AUTHORIZATION DATE: <i>Tara [Signature]</i> 4/24/24 ELECTRONIC SIGNATURE ON FILE | ATTORNEY GENERAL APPROVAL AS TO FORM DATE: <i>John S. Gray</i> 4/29/2024 ELECTRONIC SIGNATURE ON FILE | ENCUMBRANCE CERTIFICATION DATE: <i>[Signature]</i> 4-30-24 ELECTRONIC SIGNATURE ON FILE |
|---|--|--|

Extended Description:

Change Order 1

To establish the contract effective start and effective end dates, and to issue the Notice to Proceed for the contract according to all terms, conditions, prices, and specifications contained in the original contract, including all authorized change orders.

Contract Term: 08/28/2023 through 02/18/2025

| Line | Commodity Code | Quantity | Unit | Unit Price | Total Price |
|--------------|----------------|--------------|----------|------------|-------------|
| 1 | 72000000 | 0.00000 | | 0.00000 | 895000.00 |
| Service From | Service To | Manufacturer | Model No | | |
| 2023-08-28 | 2025-02-18 | | | | |

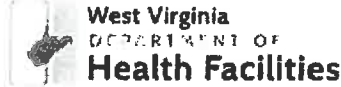
Commodity Line Description: SITE MODIFICATIONS FOR LODOX EXERO-DR INSTALLATION

Extended Description:

LUMP SUM TOTAL FOR ALL LABOR, MATERIALS, EQUIPMENT, AND SUPPLIES NECESSARY TO COMPLETE PROJECT



Sherri A. Young, D.O., MBA, FAAFP
DH Cabinet Secretary



Michael J. Caruso
DHF Cabinet Secretary



Cynthia A. Persily, Ph.D.
DoHS Cabinet Secretary

STATE OF WEST VIRGINIA
DEPARTMENTS OF HEALTH, HEALTH FACILITIES, AND HUMAN SERVICES
OFFICE OF SHARED ADMINISTRATION

Date: April 4, 2024

To: Crystal Hustead, CPPB
Senior Buyer, West Virginia Purchasing Division

From: Robert Price, CPPO, CPPB, NIGP-CPP *RP*
Administrative Services Manager II, OFFICE OF SHARED ADMINISTRATION

RE: CPO 0506 2937 CME2400000001

The Office of Shared Administration respectfully requests a change order be processed to establish the service to dates for the above referenced document.

The vendor was given a verbal notice to proceed by the spending unit to begin work on August 28, 2023.

We have spoken with the spending unit about the need for a formal change order to be issued to establish the service dates.

Thank you in advance for your consideration of this request. If you have any questions, please do not hesitate to contact me at your earliest convenience.

*Backdate
approved
JPC*



ATA Document G702™ - 1992

Application and Certificate for Payment

TO OWNER: State of WV
Office of Chief Med. Exam.
619 Virginia St. West, Chas. WV 25302
Matt Lazo, Chief Administrator

PROJECT: State of WV
Office of Chief Med. Exam.
619 Virginia St. West
Charleston, WV 25302

FROM CONTRACTOR:
Dougherty Company, Inc.
600 50th Street SE
Charleston, WV 25304

VIA ARCHITECT:
ZDS Design/Consulting Services
135 Corporate Ctr. Dr. Suite 532
Scott Depot, WV 25560

Invoice No.: 8426

APPLICATION NO: 1

PERIOD From: 08/28/2023

Period To: 12/31/2023

CONTRACT FOR: WVDHHR Med Examiners Office

CONTRACT DATE: 08/28/2023

PROJECT NOS: GPO CME/ 2400000001

Distribution to:

OWNER

ARCHITECT

CONTRACTOR

FIELD

OTHER RA ✓

CONTRACTOR'S APPLICATION FOR PAYMENT

Application is made for payment, as shown below, in connection with the Contract.
AIA Document G703™, Continuation Sheet, is attached.

| | |
|---|---|
| 1. ORIGINAL CONTRACT SUM | \$ 895,000.00 |
| 2. NET CHANGE BY CHANGE ORDERS | \$ 0.00 |
| 3. CONTRACT SUM TO DATE (Line 1 + 2) | \$ 895,000.00 |
| 4. TOTAL COMPLETED & STORED TO-DATE (Column G on G703) | \$ 13,000.00 |
| 5. RETAINAGE: | |
| a. 10 % of Completed Work (Columns D + E on G703) | \$ 1,300.00 |
| b. 0 % of Stored Material (Column F on G703) | \$ 0.00 |
| Total Retainage (Lines 5a + 5b, or Total in Column I of G703) | \$ 1,300.00 |
| 6. TOTAL EARNED LESS RETAINAGE | \$ 11,700.00 (Line 4 minus Line 5 Total) |
| 7. LESS PREVIOUS CERTIFICATES FOR PAYMENT | \$ 0.00 (Line 6 from prior Certificate) |
| 8. CURRENT PAYMENT DUE | \$ 11,700.00 <i>RKA 01/08/2024</i> |
| 9. BALANCE TO FINISH, INCLUDING RETAINAGE (Line 3 minus Line 6) | \$ 883,300.00 |

| CHANGE ORDER SUMMARY | ADDITIONS | DEDUCTIONS |
|--|-----------|------------|
| Total changes approved in previous months by Owner | \$ | \$ |
| Total approved this month | \$ | \$ |
| TOTAL | \$ | \$ |
| NET CHANGES by Change Order | \$ | |

CAUTION: You should sign an original AIA Contract Document, on which this text appears in RED. An original assures that changes will not be obscured.

AIA Document G702™ - 1992. Copyright © 1953, 1963, 1965, 1971, 1978, 1983 and 1982 by The American Institute of Architects. All rights reserved. **WARNING:** This AIA® Document is protected by U.S. Copyright Law and International Treaties. Unauthorized reproduction or distribution of this AIA® Document, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law. Purchasers are permitted to reproduce ten (10) copies of this document when completed. To report copyright violations of AIA Contract Documents, e-mail The American Institute of Architects' legal counsel, copyright@aia.org.

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown herein is now due.

CONTRACTOR:

By:

Date: 01/03/2024

State of: WV Brian W. Smith, President

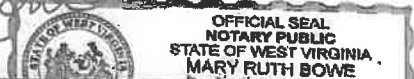
County of: Kanawha

Subscribed and sworn to before me this 3rd

day of January, 2024

Notary Public:

My commission expires: June 15, 2025



ARCHITECT'S CERTIFICATE FOR PAYMENT

In accordance with the Contract Documents, based on on-site observations and the information contained in this application, the Architect certifies to the Owner that to the best of the Architect's knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the AMOUNT CERTIFIED.

AMOUNT CERTIFIED \$ 11,700.00

(Attach explanation if amount certified differs from the amount applied. Initial all figures on this Application and on the Continuation Sheet that are changed to conform with the amount certified.)

ARCHITECT:

By:

Date: 01/05/2024

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

TO (OWNER): STATE OF WV
OFFICE OF CHIEF MED EXAMINER
619 VIRGINIA STREET WEST
CHARLESTON, WV 25302
MATT IZZO, CHIEF ADMINISTRATOR
FROM (CONTRACTOR): DOUGHERTY COMPANY, INC.
600 50TH STREET SE
CHARLESTON, WV 25304

PROJECT: STATE OF WV
OFFICE OF CHIEF MED EXAMINER
619 VIRGINIA STREET WEST
CHARLESTON, WV 25302
VIA (ARCHITECT):
ZDS DESIGN/CONSULTING SERVICES
135 CORPORATE CTR. DR. SUITE 532
SCOTT DEPOT, WV 25560

APPLICATION NO: 1
PERIOD FROM: 08/28/2023
PERIOD TO: 12/31/2023
PROJECT NOS:
CPO CME 240000001

DISTRIBUTION TO:
- OWNER
- ARCHITECT
- CONTRACTOR
X OTHER - RA

CONTRACT FOR: WVDHHR MED EXAMINER'S OFFICE

CONTRACT DATE: 08/28/2023

| ITEM | DESCRIPTION | SCHEDULE VALUE | PREVIOUS APPLICATIONS | COMPLETED THIS PERIOD | STORED MATERIAL | COMPLETED STORED | % | BALANCE | RETAINAGE |
|--------------------|------------------------------|-------------------|--------------------------|--------------------------|--------------------|---------------------|--------|-----------|-----------|
| 1 | BOND/INSURANCE | 13,000.00 | 0.00 | 13,000.00 | 0.00 | 13,000.00 | 100.00 | 0.00 | 1,300.00 |
| 2 | MOBILIZATION | 600.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 600.00 | 0.00 |
| 3 | GENERAL CONDITIONS | 700.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 700.00 | 0.00 |
| SHEET METAL | | | | | | | | | |
| 4 | SHEET METAL EQUIPMENT - M | 81,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 81,000.00 | 0.00 |
| 5 | SHEET METAL EQUIPMENT - L | 18,800.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 18,800.00 | 0.00 |
| 6 | DUCT - M | 31,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 31,000.00 | 0.00 |
| 7 | DUCT - L | 32,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32,000.00 | 0.00 |
| 8 | ROOF CURBS/SUPPORTS - M | 18,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 18,000.00 | 0.00 |
| 9 | ROOF CURBS/SUPPORTS - L | 16,800.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 16,800.00 | 0.00 |
| 10 | HVAC EQUIPMENT - M | 80,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 80,000.00 | 0.00 |
| 11 | HVAC LABOR - L | 34,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 34,000.00 | 0.00 |
| 12 | PIPING - M | 42,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 42,000.00 | 0.00 |
| 13 | PIPING - L | 21,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 21,000.00 | 0.00 |
| 14 | IOM'S AND CLOSEOUT DOCUMENTS | 500.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 500.00 | 0.00 |
| 15 | OWNER TRAINING | 600.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 600.00 | 0.00 |
| 16 | EQUIPMENT STARTUP | 400.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 400.00 | 0.00 |
| 17 | 2 YEAR MAINTENANCE - M | 2,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2,000.00 | 0.00 |
| 18 | 2 YEAR MAINTENANCE - L | 4,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4,000.00 | 0.00 |
| 19 | TAB - M | 1,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1,000.00 | 0.00 |
| 20 | TAB - L | 3,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3,000.00 | 0.00 |

TO (OWNER): STATE OF WV
OFFICE OF CHIEF MED EXAMINER
619 VIRGINIA STREET WEST
CHARLESTON, WV 25302
MATT IZZO, CHIEF ADMINISTRATOR
FROM (CONTRACTOR): DOUGHERTY COMPANY, INC.
600 50TH STREET SE
CHARLESTON, WV 25304

PROJECT: STATE OF WV
OFFICE OF CHIEF MED EXAMINER
619 VIRGINIA STREET WEST
CHARLESTON, WV 25302
VIA (ARCHITECT):
ZDS DESIGN/CONSULTING SERVICES
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APPLICATION NO: 1
PERIOD FROM: 08/28/2023
PERIOD TO: 12/31/2023
PROJECT NOS:
CPO CME 240000001

DISTRIBUTION TO:
 OWNER
 ARCHITECT
 CONTRACTOR
 OTHER - RA

CONTRACT FOR: WVDHHR MED EXAMINER'S OFFICE

CONTRACT DATE: 08/28/2023

| ITEM | DESCRIPTION | SCHEDULE VALUE | PREVIOUS APPLICATIONS | COMPLETED THIS PERIOD | STORED MATERIAL | COMPLETED STORED | % | BALANCE | RETAINAGE |
|------------------------|---------------------------|---------------------|-----------------------|-----------------------|-----------------|--------------------|-------------|---------------------|-------------------|
| 21 | OWNER'S CONTINGENCY | 10,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 10,000.00 | 0.00 |
| GENERAL TRADES | | | | | | | | | |
| 22 | ROUGH CARPENTRY - M | 85,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 85,000.00 | 0.00 |
| 23 | ROUGH CARPENTRY - L | 56,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 56,000.00 | 0.00 |
| 24 | CEMENT UNDERLAYMENT - M | 32,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32,000.00 | 0.00 |
| 25 | CEMENT UNDERLAYMENT - L | 29,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 29,000.00 | 0.00 |
| 26 | LEAD LINED ITEMS - M | 63,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 63,000.00 | 0.00 |
| 27 | LEAD LINED ITEMS - L | 40,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40,000.00 | 0.00 |
| 28 | CEILINGS/PAINT - M | 5,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 5,000.00 | 0.00 |
| 29 | CEILINGS/PAINT - L | 10,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 10,000.00 | 0.00 |
| ELECTRICAL WORK | | | | | | | | | |
| 30 | CONDUIT/WIRE/CABLE - M | 32,500.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32,500.00 | 0.00 |
| 31 | CONDUIT/WIRE/CABLE - L | 32,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32,000.00 | 0.00 |
| 32 | EQUIPMENT/BREAKERS - M | 38,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 38,000.00 | 0.00 |
| 33 | EQUIPMENT/BREAKERS - L | 14,100.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 14,100.00 | 0.00 |
| 34 | LIGHTING/ACCESS/FIRE - M | 15,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 15,000.00 | 0.00 |
| 35 | LIGHTING/ACCESS/FIRE - L | 13,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 13,000.00 | 0.00 |
| TEMP CONTROLS | | | | | | | | | |
| 36 | ENGINEERING/SHOP DRAWINGS | 4,500.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4,500.00 | 0.00 |
| 37 | CONTROLS - M | 20,000.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 20,000.00 | 0.00 |
| 38 | CONTROLS - L | 15,500.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 15,500.00 | 0.00 |
| REPORT TOTALS | | \$895,000.00 | \$0.00 | \$13,000.00 | \$0.00 | \$13,000.00 | 1.45 | \$882,000.00 | \$1,300.00 |

Keyword Search


For more information on how to use our keyword search, visit our help guide

Simple Search

Search Editor

Any Words 

All Words 

Exact Phrase 

e.g. 123456789, Smith Corp

"dougherty co inc" 

Entity 

Location 

Status 

Active

Inactive

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No matches found

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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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DOUGHERTY COMPANY, INC.

| Organization Information | | | | | | | | |
|--------------------------|----------------|------------------|-------------|----------|--------|----------|------------------|--------------------|
| Org Type | Effective Date | Established Date | Filing Date | Charter | Class | Sec Type | Termination Date | Termination Reason |
| C Corporation | 4/30/2002 | | 4/30/2002 | Domestic | Profit | | | |

| Organization Information | | | |
|---------------------------|---|--|--|
| Business Purpose | 2382 - Construction - Special Trade Contractors - Building Equipment Contractors (electrical & other wiring, plumbing, heating & air-conditioning, other) | | Capital Stock 5000.0000 |
| Charter County | Kanawha | | Control Number 47562 |
| Charter State | WV | | Excess Acres |
| At Will Term | | | Member Managed × Close |
| At Will Term Years | | | Pa |
| Authorized Shares | 5000 | | Y Entr |

Hi, I'm SOLO I'm here to help you launch your new LLC.

Addresses

| Type | Address |
|----------------------------------|---|
| Mailing Address | S.M. BOWLING PO BOX 1828 CHARLESTON, WV, 25327 USA |
| Mailing Address | P. O. BOX 1828 CHARLESTON, WV, 25327 USA |
| Notice of Process Address | BRIAN W. SMITH P.O. BOX 1828 CHARLESTON, WV, 25327 |
| Principal Office Address | 600 50TH STREET SE CHARLESTON, WV, 25304 USA |
| Type | Address |

Officers

| Type | Name/Address |
|---------------------|--|
| Director | BRIAN W SMITH 1417 GRASSLICK ROAD RIPLEY, WV, 25271 |
| Director | ERIC M SMITH 10 RALEIGH PLACE CROSS LANES, WV, 25313 |
| Incorporator | S.M. BOWLING PO BOX 1828 CHARLESTON, WV, 25327 USA |
| President | BRIAN W. SMITH 1417 GRASSLICK ROAD RIPLEY, WV, 25271 |
| Secretary | MARY R. BOWE 5807 CAMPBELL'S CREEK DRIVE CHARLESTON, WV, 25306 |
| Type | Name/Address |

Hi, I'm SOLO I'm here to help you launch your new LLC.

Annual Reports

Filed For

2023

2022

| |
|-------------------|
| 2021 |
| 2020 |
| 2019 |
| 2018 |
| 2017x |
| 2017 |
| 2016 |
| 2015 |
| 2014 |
| 2013 |
| 2012 |
| 2011 |
| 2010 |
| 2009 |
| 2008 |
| 2007 |
| 2006 |
| 2005 |
| 2004 |
| 2003 |
| Date filed |

[File Your Current Year Annual Report Online Here](#)

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

Tuesday, April 16, 2024 — 9:32 AM

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Hi, I'm SOLO I'm here to help you launch your new LLC.

COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

| | |
|--|--|
| <i>Purchasing Division Use:</i> Buyer: <u>Crystal Husted</u> Date: <u>4/16/24</u> Solicitation No. <u>CPO CME24*01</u> | Agency: WV Department of Health & Human Resources <hr/> Procurement Officer Submitting Requisition: Heather White <hr/> Requisition No. CPO CME24*1 CO1 <hr/> PF No.: 1235882 |
|--|--|

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 type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Use of correct specification template | <input checked="" type="checkbox"/> | <input 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 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 type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Maximum budgeted amount in wvOASIS | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Suggested vendors in wvOASIS | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | Capitol Building Commission pre-approval | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 | Financing (Governor's Office) pre-approval | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 | Fleet Management Division pre-approval | <input type="checkbox"/> | <input type="checkbox"/> | <input 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 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 type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 4 | Justification for price increases/backdating/other | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 5 | Bond Rider (Construction) | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input 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: _____

Cynthia Husted

REFERENCE:

FOR ALL SOLICITATION TYPES:

1. **Specifications and Pricing Page.** The specifications and intended pricing evaluation tool (wvOASIS line or pricing page) must be attached to the requisition for the Purchasing Division to review them.
2. **Usage of correct specification template.** The Purchasing Division maintains standard format templates on its website for various purchase types, including but not limited to one-time, services, and open-end RFQ purchases; RFPs; and EOs. Using the correct specification template ensures language appropriate for the type of purchase will be contained in the final contract. A copy of these templates can be found on the Purchasing Division's website at www.state.wv.us/admin/purchase/forms.html.
3. **Use of correct requisition type.** Agencies must discern the type of contract needed prior to entering the requisition in wvOASIS. The requisition type will limit the type of award that can be issued for each solicitation. **Purchasing Division Procedures Handbook, Section 3.3.1.1.**
4. **Terms and conditions.** The agency must complete the General Terms and Conditions using the master copy maintained by the Purchasing Division, and the revision date on the terms and conditions document must not be removed or altered in any way. The Purchasing Master Terms and Conditions can be found on the Purchasing Division's website at www.state.wv.us/admin/purchase/TCP.pdf. **Purchasing Division Procedures Handbook, Section 3.2.4.6.**
5. **Maximum budgeted amount.** This is the maximum amount of funding available for the purchase of the good or service as determined by the agency prior to requisition submission. This amount determines the agency's ability to negotiate and cannot be changed after the bid opening. **Purchasing Division Procedures Handbook, Section 6.9.3.1.**
6. **Suggested vendors.** Suggested vendors are identified at the time an agency conducts its market research and are placed in the Vendor List or Free Form Vendor fields within the requisition. This ensures the vendors are made aware of the bidding opportunity.
7. **Capitol Building Commission pre-approval.** Pre-approval from the Capitol Building Commission is required before any contract can be bid for work requiring a substantial physical change to the state capitol building or surrounding complex, before work begins to a building on the capitol complex if not done under a contract, and prior to processing change orders for work to buildings on the capitol complex above \$40,000. **Purchasing Division Procedures Handbook, Section 7.2.**
8. **Financing pre-approval.** Any loan or extension of credit from a bank or other financial institution by any state agency under the Executive Branch requires pre-approval from the Governor's Office and must be in the best financial interest of the state of West Virginia. **Per memorandum from the Governor's Office.**
9. **Fleet Management Division pre-approval.** Pre-approval by the Fleet Management Division (FMD) is required to purchase vehicles, unless statutorily exempt. Any request made under the authority of the Fleet Management Division to increase an agency's fleet size must be approved by the FMD executive director, and all vehicle purchases, regardless of dollar amount, must be processed through the Purchasing Division. **Purchasing Division Procedures Handbook, Section 7.8.**
10. **Insurance requirements.** **RE Purchasing Division Procedures Handbook, Section 3.2.5.3. Appendix C.**
11. **Office of Technology CIO pre-approval.** In accordance with the Office of Technology's CIO-19-001 policy, all technology procurement requests, unless exempted, require Chief Information Officer (CIO) approval. **Purchasing Division Procedures Handbook, Section 7.3.**
12. **Treasurer's Office (banking) pre-approval.** Pre-approval is required by the State Treasurer's Office for the acquisition of banking goods or services, which includes but may not be limited to accepting payments and receiving funds via electronic commerce. **W. Va. Code §§ 12-1-7 and 12-3A-6.**

FOR CHANGE ORDERS/RENEWALS:

1. **Two-party agreement.** This agreement, confirming the need for the change order, must be signed by both the agency and the vendor. A single letter of agreement with both signatures is standard.
2. **Standard change order language.** The Purchasing Division maintains standard language to be used in the Extended Description field when issuing a change order in wvOASIS. There are various descriptors available to address the change to the original contract, including but not limited to a standard renewal, a renewal with an increase or decrease, a construction extension for time only or time and increase, a cancellation, and an administrative change. **Purchasing Division Procedures Handbook, Appendix D.**
3. **Office of Technology CIO pre-approval.** See #11.
4. **Justification for price increases/backdating/other.** Any change order request that increases the amount of the contract, is backdated more than 20 days past the submission date of the change order, or otherwise affects provisions of the contract not typically seen in a change order requires justification.
5. **Bond rider.** A bond rider allows bonded principals to request changes to be made to their original surety bond agreements. The bond rider is the only valid way of making changes to a bond agreement which does not invalidate the agreement.
6. **Secretary of State verification.** Unless a waiver is obtained from the Secretary of State's Office, every vendor organized as a business entity must have a certificate of authority and be in good standing with the Secretary of State's Office. To search for a business with the Secretary of State's Office, visit <http://apps.sos.wv.gov/business/corporations>. Any vendor that cannot be found or shows a status of "revoked" or "dissolved" is not eligible for award until the issue is resolved. Agencies must verify this compliance manually prior to award and include a copy of the relevant record in the agency file. **Purchasing Division Procedures Handbook, 5.3.2. Vendor Compliance. E. Secretary of State.**
7. **State debarment verification.** Pursuant to *West Virginia Code* §5A-3-33c and 33d, the State of West Virginia and its political subdivisions may not solicit offers from, award contracts to, or consent to subcontract with a debarred vendor during the debarment period. A list of vendors debarred by the West Virginia Purchasing Division can be seen online at www.state.wv.us/admin/purchase/debar.html. **Purchasing Division Procedures Handbook, 5.3.2. Vendor Compliance. D. State Debarment.**
8. **Federal debarment verification.** Vendors must verify that a vendor is not debarred by the federal government prior to awarding a contract by visiting Sam.gov. Instructions for manually checking a vendor's federal debarment status can be found online at https://www.fsd.gov/qsafsd_sp?id=kb_article_view&sysparm_article=KB0036199&sys_kb_id=b372dad1b4ac5d40ca4a97ae54bcbb2&spa=1. **Purchasing Division Procedures Handbook, 5.3.2. Vendor Compliance. C. Federal Debarment.**

Questions regarding this *Compliance Verification Checklist for Requisition Submission* may be directed to your assigned Purchasing Division buyer. If you're unsure who your buyer is, see the Agency-Buyer assignments published online at www.state.wv.us/admin/purchase/byrassign.pdf.