

THE BUYERS NETWORK

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THE BUYERS NETWORK is Published Monthly by the Purchasing Division of the West Virginia Department of Administration to Promote Better Value in Public Purchasing

Agency Purchasers Encouraged to Pursue the Steps to Achieving Purchasing Certification

The Purchasing Division administers the West Virginia Procurement Certification program, which provides professional development and recognition to procurement officers whose job duties fall primarily under the authority of *West Virginia Code* §5A-3. Procurement officers from agencies exempt in full or in part from this authority are not eligible to participate, unless 75 percent or more of their job duties relate to transactions under the Department of Administration, Purchasing Division's authority. There are two levels of this Certification Program, basic and advanced. Upon successful completion of certification, recipients must meet additional requirements every three years to maintain their certification. Requirements can be found as follows:



Senior Buyer Guy Nisbet is pictured at the 2012 Agency Purchasing Conference. Attendance at the conferences is one requirements of the certification program.

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Purchasing Division Continues its 2013 In-House Training Schedule

The West Virginia Purchasing Division moves full throttle into the 2013 training schedule with two sessions planned for February and three sessions for March, including a webinar.

Sessions for February include:

- **Wednesday, February 6:** Surplus Property and Fixed Assets (10-11 a.m.)
- **Wednesday, February 27:** Request for Quotation; Evaluation and Award Process; Change Orders and Addenda (9 a.m.-12 p.m.)

Sessions for March include:

- **Wednesday, March 6:** Statewide Contracts (10-11 a.m./webinar)
- **Wednesday, March 13:** Agency Delegated Purchasing; Emergency and Sole Source Purchases; Inspection Services (9 a.m.-12 p.m.)
- **Wednesday, March 27:** wvOASIS/Commodity Codes (10-11 a.m.)

Classes will be held either in the Gaston Caperton Training Center in Building 7 or in the Purchasing Division first floor conference room. Regis-

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THE DIRECTOR'S COMMENTS

Planning Already Started on 2013 Agency Purchasing Conference Event ... with Several Changes in Store

By Purchasing Director Dave Tincher

The Purchasing Division is always looking at ways to improve our training program in order to meet the needs of our agency procurement officers. With the expansion of webinars as part of our in-house training curriculum and adding more audience interaction to these sessions, it is our goal to continue to enhance the education and information outreach to our agency partners.

One of our biggest events each year is our Agency Purchasing Conference, which provides a comprehensive array of informational sessions ranging from purchasing processes to programs administered by the Purchasing Division to available resources. As I stress each and every year during our conference, we rely heavily on the feedback that we receive from our conference participants on the evaluation forms to make positive changes to our curriculum and

our conference format. We are always willing to consider new and innovative ideas to determine if they enhance the learning process.

As a result of the feedback from last year's conference, the Purchasing Division will be making a constructive change to the 2013 Agency Purchasing Conference format. To ensure that all agency purchasers have the opportunity to not only attend the conference, but also stay at the host facility, there will be two shorter conferences offered later this fall. The tentative dates for these conferences are listed below:

- Pipestem Resort State Park: Tuesday, October 22, through Thursday,



October 24

• Stonewall Resort: Wednesday, October 30, through Friday, November 1

Time will be built into the agenda to allow for travel to the host facility with the conference commencement occurring later in the day. To better accommodate our conference participants, conference registration and

room reservations will open at the same time. Additional information on these important details will be shared with our agency purchasers and included in *The Buyers Network* at a later time. With having smaller conferences, it is our hope that more discussion among the agency purchasers and our staff will occur, resulting in positive outcomes.

Avoid Third-Party Vendors When Traveling on State Business

State agency travel coordinators are reminded to have their agency employees not use third party vendors when making travel arrangements, particularly lodging and car rental reservations. The use of third party vendors can result in the traveler incurring expenses which are not reimbursable.

“When a reservation is made through a third party vendor, such as an internet-based company, that company has bought a book of rooms from a hotel and owns the room being reserved,” said State Travel Manager Catherine DeMarco. “As a result, when a traveler goes to check out, the hotel cannot provide a detailed invoice or folio as it is the third party vendor who has it, not the hotel. Without this detailed folio, the state traveler cannot be reimbursed.”

DeMarco noted this situation is addressed twice in the State Travel Policy, which can be viewed at: <http://www.state.wv.us/admin/purchase/travel/TravelRule.pdf>.

The policy notes in Section 4.2.6.4 that “If a third party booking incurs a service fee, that fee will not be reimbursed (i.e. some internet sites charge a service fee for booking vehicles). Travelers may use car rental services from another company in the following situations: a) Rental car vendor does not have a location in the specific area. b) Rental car vendor does not have the appropriate vehicle at the time needed. c) Rental car vendor does not have the appropriate vehicle for the duration needed. Travelers must note these exceptions on the travel expense settlement form.”

The two statewide contracts for rental vehicles are with Enterprise Rent-A-Car and Hertz Corporation. This contract can be reviewed at: <http://www.state.wv.us/admin/purchase/swc/CRENTAL.htm>

In Section 5.1.7, the policy states, “Under no circumstances should a hotel be

Statewide Contract for Motel Discounts Will Not Be Renewed

The statewide contract for motel discounted rates (MOTL), bid and maintained by the Purchasing Division, expired at the end of December and it will not be renewed or rebid. The Purchasing Division recommends visiting the Travel Management website for a link to an extended list of lodging facilities which show properties honoring discounted rates for government employees.

This list can be found at <http://www.state.wv.us/admin/purchase/travel/lodging.html>. The link is directed to a national contract arranged by the state of Oregon and made available to participating states in the Western States Contracting Alliance (WSCA), in

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Purchasing Division's Front Office Must Be Precise with the Official Bid Receipt Process

One of the primary places registered vendors will do business with the state is located in the Purchasing Division's front office.

This is the area where Office Assistants Gail Montantez and Krystle Harrison collect, track and secure submitted proposals in anticipation of their respective bid openings. The bid receipt process comprises specific steps to ensure bids are considered valid to be part of the procurement process.

The bid receipt process requires vendors to submit their proposals to the Purchasing Division for a specific solicitation prior to its scheduled opening. For bids to be valid, they must be received and time-stamped by a Purchasing employee – usually Montantez or Harrison by 1:30 p.m. on the solicitation's designated bid opening day. When bids come in, they are time-stamped to indicate they were received in advance of their bid openings as required by law.

"We always try to make this a smooth process," Montantez said. "Most of the time, vendors dropping off bids will trust us to time-stamp the item but, sometimes, people will take pictures with their cell phones to prove that they delivered their bids. It is our policy not to give a receipt since we cannot assure the contents of the sealed envelope. It is interesting in that some people submitting bids are dressed in suit and tie or other business attire while other times, people submitting bids are wearing work boots and overalls."

Yet, there are rushed moments to endure as well.



Office Assistants Gail Montantez, midground, and Krystle Harrison, background, collect and secure submitted bids and proposals in anticipation of their respective bid openings.

Pictured, Gail and Krystle welcome visitors to the Purchasing Division and require that all visitors sign into the building at the front window.

"We have had vendors come in about 5 to 10 minutes before a bid opening but have yet to submit their bid and are still on the cell phone with their business associates discussing everything they need to complete the bid paperwork before submitting it to me," Montantez said. "They will be writing the information on the outside of the envelope, and finally sub-

mitting it at 1:29 p.m."

Montantez emphasized that submitted bids are checked meticulously by two people each day to ensure that the bids are placed for the proper bid-opening date in a secure area.

When it is time for bids to be opened,

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MOTEL

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which West Virginia is a member.

"The WSCA contract is a reference resource only and is not mandatory for state agencies to use. By discontinuing the statewide contract **MOTL**, this makes for a more efficient way to consolidate the process of locating lodging facilities which honored per diem rates," said Mike Sheets, Assistant Purchasing Director for the Acquisition and Contract Administration Section. For questions about travel, contact State Travel Director Catherine DeMarco at (304) 558-2613 or Catherine.A.Demarco@wv.gov.

TRAVELING

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booked through a third party vendor (i.e. Hotels.com, Travelocity, Expedia, etc). Third party vendors are unable to provide an invoice or folio for reimbursement and charge service fees that are not reimbursable."

DeMarco said state employees must utilize National Travel, the statewide contract vendor for Travel Services. This contract can be reviewed at: <http://www.state.wv.us/admin/purchase/swc/TRAVEL.htm>. To learn more about state travel regulations and policies, please visit <http://www.state.wv.us/admin/purchase/travel>.

Procurement Officer Profile

Dana Hoffman Looks at Procurement Issues with a Legal Mind

Dana Hoffman approaches procurement not just from the dollar-and-cents aspect, but also from a legal viewpoint. It is a view borne out of more than a decade spent in the legal field as a paralegal.

“Because I have a legal background, whenever I am working on a purchase, I work to ensure that we are following the letter of the law,” Hoffman said. As the procurement officer for the Offices of the Insurance Commissioner, Hoffman said procurement is most often a matter of knowing the law and the rules. “The Offices of the Insurance Commissioner has rules, and the Purchasing Division has its rules, and we have to know all of the rules for both to make sure everything goes the way it should.”

Hoffman's arrival into state procurement has been a journey, though, that has allowed him to see the many different sides of procurement. A native of Lincoln County and graduate of Duval High School, Hoffman began his career as a surveyor for the Department of Highways before moving into the private sector. “I worked for engineers, and on most jobs we were the vendor, purchasing the product and then selling it to the state,” he said.

But it was an interest in private investigation work that would change his professional career. Hoffman had always had an interest in becoming a private investigator, and he found out that having a paralegal degree would qualify him to get a private investigator's license.

“As I worked on my degree, I found out that most private investigation work was dry and monotonous, and I lost my interest,” he said. “However, while I was interning at a law office, the attorney I was working for wanted to keep me on full time.”

After 13 years as a paralegal, though, Hoffman found himself changing careers again and found his way working in procurement for the Offices of the Insurance Commissioner, beginning in April, 2012. He said the learning curve has been wide but he feels that he has a solid basis.

“The interesting thing is that I have legal experience, a background as a vendor,



Dana Hoffman's career took him from working with the Division of Highways to becoming a paralegal and finally coming to the Offices of the Insurance Commissioner as a procurement officer.

and experience as a procurement officer,” he said. “Those are three areas which seem to compliment this job.”

Hoffman works with Administrative Support Manager Vickie Marcum on all purchases. Every purchase for the agency begins as a Request for Supplies (RFS). Hoffman said each RFS must give justification for the purchase and must be signed off by the director. “Every time I see an RFS, I think of tax payer dollars,” he said. “If the public sees this record, it gives backup that it is needed, and that the dollars are well spent.”

Procurements for the agency range from office supplies to court reporters. In addition, the agency is overseeing changes brought about by the Affordable Care Act. “Many people have a very narrow view of what the Offices of the Insurance Commissioner do,” he said. “However, it is a very broad and wide-reaching agency.”

Changes Made to the Purchasing Division Procedures Handbook

The **Purchasing Division Procedures Handbook** has undergone revisions which went into effect February 1, 2013. These modifications, which were distributed to agency procurement officers in advance of the effective date, were made to better clarify purchasing procedures regarding release orders, the Expression of Interest process and certain definitions.

The Handbook can be reviewed in its entirety at: www.state.wv.us/admin/purchase/Handbook/default.html.

Agency procurement officials are encouraged to periodically review the **Purchasing Division Procedures Handbook** and contact their assigned Purchasing Division buyer with additional comments, questions or suggestions.

New Statewide Contract for Electronic Recycling

Surplus Property Coordinates Retirements with OT

The Legislature passed a law (*West Virginia Code* §5A-6-4 Section 14-b-6) during the 2011 Regular Session of the Legislature which authorized the West Virginia Office of Technology (WVOT) to establish policy for the retirement of electronic equipment of Executive Branch agencies.

The legislation went into effect July 1, 2012 and as a result, the WVOT announced its new policy in November. In December, the Purchasing Division awarded the statewide contract for electronic recycling (ERCYCL) to multiple vendors. The purpose of the contract is to properly dispose of electronic equipment which has been retired and no longer has use. Procurement officers are encouraged to review the WVOT policy for procedures in retiring electronic equipment at: <http://www.technology.wv.gov/SiteCollectionDocuments/EquipmentRecycling.pdf>.

The policy lists the type of electronic equipment that is to be retired to the WVOT warehouse in Kanawha City. Emily Dowdy, Business Analyst at the WVOT, notes there are a few, but not many, new requirements in the retirement procedures.

“Agencies are to follow proper sanitization procedures and are to still retire their electronic equipment to Surplus Property



The purpose of statewide contract ERCYCL is to properly dispose of electronic equipment which has been retired and no longer has use. Retired electronics, such as computers, should be delivered to the Office of Technology warehouse in Kanawha City.

through WVFIMS or by utilizing a WV-103 form. The main difference now is that once Surplus Property officials deem the retired property as an electronic device and is to come to the WVOT, the agencies are now required to tag and deliver the equipment to the WVOT warehouse,” she said. “It is important to note that even if the electronic equipment is damaged or does not work it is still required to come

to the WVOT.”

Once electronic equipment is sent to the WVOT warehouse, Dowdy said one of several options will follow depending on the age and condition of the equipment. One option is that it will go through a secondary bid process to be recycled by one of the ERCYCL vendors. Another option

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Two New Employees Join the Purchasing Division's Staff

The Purchasing Division is pleased to welcome two new employees to its staff.

Laura Hooper joins the staff of the Acquisition and Contract Administration Section as a purchasing assistant, providing support to members of the buying staff. Hooper lives in Charleston, a graduate of Herbert Hoover High School, and has a bachelor's degree in communications studies from West Virginia University and an MBA from the University of Charleston. Hooper has previously worked as an account manager, marketing manager, contracts administrator and projects archivist.

Krystle Harrison works in the Communication and Technical Services Section as an Office Assistant II, serving as a bid clerk and assisting in the reception area. A resident of Kenna, Harrison attended Ripley High School and has an



KRYSTLE HARRISON

associate degree in legal office assisting. She previously worked as a paralegal.



LAURA HOOPER

Please welcome Laura and Krystle into the Purchasing Division family!

CERTIFICATION

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Thus far, 25 procurement officers have completed Basic and Advanced certification.

West Virginia Procurement: Basic Certification (WVPBC)

Step 1: Achieve one year of experience in public procurement (from January 1, 2009 - present) AND receive verification by immediate supervisor and agency head that the scope of work that you do involves a level of 75% or greater of public procurement responsibilities for your respective agency in a professional, not support-level, role. If applicable, approval is also required by your department's designated procurement officer. Public procurement responsibilities include but are not limited to: overseeing the agency's compliance with purchasing law, regulations, and procedures; ensuring vendors are registered; preparing and approving specifications; preparing requests for quotation, requests for proposal, and other types of purchasing transactions; evaluating bids and awarding contracts/purchase orders; receiving commodities and services, and more.

Step 2: Attend at least one recent Agency Purchasing Conference (from 2009 - present) AND complete 15 different classes or learning sessions. No class or learning session shall be repeated in any one year, regardless of format. Learning sessions may include In-House Trainings, Online Modules, webinars, and Special Purchasing-Certified Events (i.e. e-Procurement demonstration, special agency training, etc.). Purchasing Certified Events are pre-approved by the Purchasing Division.

Step 3: Complete one consecutive two-day session with the Purchasing Division staff at the Purchasing Division offices.

Step 4: Successfully complete a *basic level examination*.

West Virginia Procurement: Advanced Certification (WVPAC)

Step 1: Successfully complete the *Basic Level* certification.

Step 2: Attend at least three different Agency Purchasing Conferences (from 2009 - present) AND complete 30 different classes or learning sessions. No class or learning session shall be repeated in any one year, regardless of format. Learning sessions may include In-House Trainings, Online Modules, webinars, and Special Purchasing-Certified Events (i.e. e-Procurement demonstration, special agency training, etc.). Purchasing Certified Events are pre-approved by the Purchasing Division.

Step 3: Achieve three years of experience in public procurement (from January 1, 2009 - present) AND receive verification by immediate supervisor and agency head that the scope of work that you do involves a level of 75% or greater of public procurement responsibilities for your respective agency in a professional, not support-level, role. Public procurement responsibilities include but are not limited to: overseeing the agency's compliance with purchasing law, regulations, and procedures; ensuring vendors are registered; preparing and approving specifications; preparing requests for quotation, requests for proposal, and other types of purchasing transactions; evaluating bids and awarding contracts/purchase orders; receiving commodities and services, and more.

Step 4: Perform training at the agency level on procurement-related topics (i.e. spending limits, Requests for Quotation and/or Proposal, vendor registration, etc.). The Purchasing Division must approve the training content and target audience prior to the scheduled training. The candidate is responsible for planning the logistics and must abide by the following training guidelines:

The training must:

- Highlight multiple purchasing topics
- Educate multiple agency-level employees (a minimum of 5 people)
- Provide participants with appropriate training materials, and
- Last a minimum of one hour in length

A Purchasing Division staff member will observe the training for compliance with the training requirements.

Step 5: Successfully complete an *advanced level examination*.

Re-certification Requirements

**Re-certification is required every three years and applies to both basic-certified and advanced-certified agency purchasers.*

To apply for re-certification, the agency purchaser must meet the following guidelines:

Step 1: Attend two (2) of the next (3) Agency Purchasing Conferences, **from the date of certification/re-certification.**

Step 2: Attend a minimum of twenty (20) classes, learning sessions, or Purchasing Certified Events in the three (3) year period **from the date of certification/re-certification.**

Step 3: Submit verification for re-certification form with the appropriate signature from your immediate supervisor and agency head, and if applicable, approval from your department's designated procurement officer. A copy of this form can be obtained through the Purchasing Division.

For additional information regarding the certification program, please contact Staff Development Specialist Samantha Knapp by phone at (304) 558-7022 or via e-mail at Samantha.S.Knapp@wv.gov.

To register, complete the registration form found at www.state.wv.us/admin/purchase/training/certification, and submit the form to Knapp via e-mail, or by fax at (304) 558-6026.

Interested in past issues of *The Buyers Network*? Check them out at:
<http://www.state.wv.us/admin/purchase/BN/bnlist.html>

Current Statewide Contract Update

(As of January 15, 2013)

This page includes a listing of current changes made to statewide contracts issued by the Purchasing Division. Information and dates listed in this **Current Statewide Contract Update** are subject to change. All statewide contracts are available online at <http://www.state.wv.us/admin/purchase/swc>. For more information, please contact your assigned agency buyer.

Out for Bid

Contract	Description	Bid Opening	Pre-bid?
LBSUP13	Laboratory supplies	02/06/2013	No

Under Evaluation

Contract	Description	Bid Opening	Under Eval
ABATMNT12	Asbestos abatement	01/03/2013	Yes
DIGCOP12	Digital copiers	12/04/2012	Yes
ERCYCL12F	Recycling of used electronic equipment	08/09/2012	Yes
SBUS13A	School buses	11/20/2013	Yes
SBUS13B	School buses	11/20/2013	Yes
SBUS13C	School buses	11/20/2013	Yes
VOIP13	Voice over Internet protocol solutions	01/09/2013	Yes

ERCYCLE

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deemed acceptable by the legislation is to redeploy equipment throughout state agencies.

“When we redeploy equipment, we do it at no cost to the agency. The only expense is for WVOT technicians to setup the computer or laptop for them, but there is no cost for the equipment itself,” Dowdy said. “We are currently developing a form for agencies to request items sought and we will determine eligibility. This is one way we can save the state money. This is also helpful to state agencies that have little budget room for new equipment. Only equipment deemed usable and up to our standards will be considered for redeployment.”

To review the **ERCYCL** contract, please visit <http://www.state.wv.us/admin/purchase/swc/ERCYCL.htm>.

IN-HOUSE

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tered attendees will be notified of the location beforehand. The webinar is available free to any procurement officer interested in participating.

Space is limited. Registration is given on a first-come, first-served basis. For more information or to register, visit <http://www.state.wv.us/admin/purchase/training/in-house.html>.

For questions regarding the 2013 In-House Training Program or any of the webinars, contact Staff Development Specialist Samantha Knapp at (304) 558-7022 or Samantha.S.Knapp@wv.gov.

Buyers Network

Contracts Reviewed

Statewide contracts are reviewed approximately three months prior to the actual expiration date. During this month, the following statewide contracts for which their expiration dates are approaching will be examined.

MV12	2012 (or current year) motor vehicles
IPT10	Internet Protocol Voice communications
ITECH10	Technical support
FUELT12	Fuel truck transport

FOR MORE INFORMATION

Below is a list of Purchasing Division buyers assigned to specific state agencies.

FILE	BUYER	EMAIL	PHONE
21	Krista Ferrell	Krista.S.Ferrell@wv.gov	558-2596
22	Roberta Wagner	Roberta.A.Wagner@wv.gov	558-0067
23	Frank Whittaker	Frank.M.Whittaker@wv.gov	558-2316
31	Shelly Murray	Shelly.L.Murray@wv.gov	558-8801
32	Tara Lyle	Tara.L.Lyle@wv.gov	558-2544
33	Alan Cummings	Alan.W.Cummings@wv.gov	558-2402
43	Paul Reynolds	Paul.Reynolds@wv.gov	558-0468
44	Guy Nisbet	Guy.L.Nisbet@wv.gov	558-8802
51	Connie Oswald	Connie.S.Oswald@wv.gov	558-2157

RECEIPT

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the front office staff assembles the bids for that day so the buying staff may conduct the official public bid opening.

The packaging of some of the bids received can be interesting. “One time, we had a bid opening where the boxes were so large they looked like they could house stereo speakers and there

were several boxes. It took at least three trips, using a cart to take all of them into the conference room.”

The bid receipt process is one of the most important functions of the Purchasing Division. Participating bidders have the assurance that their bids are handled securely and professionally.

Questions?...Just Ask Us!

Are you unsure of certain purchasing procedures? Do you need information on the current state travel regulations? Do you have a question regarding travel requests? Would you want to know what surplus property is available?

If you need additional information concerning any function within the Purchasing Division, complete the form below and return to the address below. You also may forward your request via e-mail.

Diane Holley-Brown, Assistant Director
Communication and Technical Services Section
West Virginia Purchasing Division
State Capitol Complex
2019 Washington Street, East
P.O. Box 50130
Charleston, WV 25305-0130
E-Mail Address: Diane.M.Holley@wv.gov

Name _____
Organization _____
Address _____
Telephone Number _____
E-Mail Address _____
Need Information about _____

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STATE OF WEST VIRGINIA

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