

# THE BUYERS NETWORK

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**THE BUYERS NETWORK**  
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of the West Virginia Department  
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## Details Offered for Procurement Officers Planning to Attend the 2016 Agency Purchasing Conference

Preparations for the 2016 Agency Purchasing Conference are underway, and the Purchasing Division is pleased to share some important logistical information to assist agency personnel who are planning to attend. The conference, which is scheduled for August 23-26 at Canaan Valley Resort, will provide attendees with valuable insight into the state purchasing process while allowing ample time for peer networking.

Registration is set to open on June 13<sup>th</sup>. Attendees will not be able to make lodging reservations at Canaan Valley Resort until that time. Conference registration and lodging reservations will be offered on a first-come, first-served basis. Please note that these are two separate processes and that registering for the conference does not guarantee a



Pictured is one of many training sessions offered at the 2015 Agency Purchasing Conference. The 2016 conference is scheduled for August 23-26 at Canaan Valley Resort, with online registration scheduled to begin on June 13<sup>th</sup>.

lodging room at the host facility. Individuals must complete the online registration form and then contact Canaan Valley Resort directly to reserve their room.

Additional lodging will be available at Blackwater Falls State Park by calling 304.259.5216. Conference participants should indicate that they are attending the 2016 Agency Purchasing Conference when making their reservation to receive

Please see **CONFERENCE**, page 4

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## WVSASP's Cannibalization Asset Form Recently Updated

The West Virginia State Agency for Surplus Property (WVSASP) recently updated its **Cannibalization Asset Request Form** (WV-105). The process of cannibalization, which allows an agency to take parts from one or more assets to maintain or repair another asset, is strictly prohibited unless pre-approved by WVSASP.

"Cannibalization allows agencies to utilize parts from debilitated equipment rather than purchase new parts," explained Elizabeth Perdue, Assistant Purchasing Director and WVSASP Manager. "It is important that Surplus Property pre-approve of the cannibalization so that it occurs only when in the best interest of the State."

WVSASP generally receives one or two requests for cannibalization each month, typically for items, such as lawn mowers and State Police vehicles. Agencies wishing to remove parts from a commodity for cannibalization purposes must request approval using the **Cannibalization Asset Request Form**.

This form must be completed with the following information regarding the asset

Please see **CANNIBALIZATION**, page 5

## THE DIRECTOR'S COMMENTS

# Agency Designated Procurement Officers Required to Complete 10 Hours Annually of Procurement Training

By Purchasing Director Dave Tincher

The West Virginia Purchasing Division prides itself on offering a comprehensive and complete statewide procurement training program. For more than four decades, our agency has provided training to agency purchasers; however, in the past 10 years, this program has flourished.

A couple of years ago, our legislators joined us in realizing the value in educating our state agency procurement personnel on the state purchasing process. As a result, they passed legislation to make this training mandatory for those individuals designated by their leadership and who have the responsibility of spending state's taxpayer dollars on behalf of their agencies.

For many years, the *Code of State Rules* has required the head of each spending unit to designate a person or persons to be responsible for the function of purchasing for that agency. 148CSR1.3.2 also states that these designees are responsible for all correspondence and communication between their agencies and the Purchasing Division.

Now, as a result of the legislation passed during the 2014 Regular Session, these individuals are also required

to take at least 10 hours annually of available training offered by the Purchasing Division, regardless of agency size or the number or cost of purchases made annually. The legislative rule applies to all spending units of state government except those statutorily exempt from our authority. In response to this requirement, hourly training requirement for agency designated procurement officers will be tracked on a Fiscal Year basis.

A great way to fully obtain these hours is to attend the annual Agency Purchasing Conference (registration opens next month!). However, for those of you who are unable to be out of the office for multiple consecutive days, the Purchasing Division also offers self-paced online agency resource modules as well as at least six webinars each year, all of which can be done from the convenience of your office.

If you prefer the face-to-face training format, our In-House Training Program offers workshops in-person each month. Depending upon the topic, these workshops range from as short as one hour trainings to a one day curriculum. You can register by visiting our in-house training webpage at: [www.state.wv.us/admin/purchase/training/2016InHouseRegistration.pdf](http://www.state.wv.us/admin/purchase/training/2016InHouseRegistration.pdf).

Although the Purchasing Division tracks attendance for all of its training events on a regular basis, a comprehensive review of our records will be conducted each December and an e-mail sent to agency procurement personnel with their mid-year training information (i.e. hours attended and hours still needed). However, if you should have questions throughout the year regarding your training hours, please do not hesitate to contact the Communication and Professional Development Unit at [Samantha.S.Knapp@wv.gov](mailto:Samantha.S.Knapp@wv.gov) or 304.558.7022.



## April Battle is Our Latest Recipient in Certification Program

The Purchasing Division is pleased to recognize April Battle as its latest recipient in the **West Virginia Procurement: Basic Certification** program. A Senior Buyer for the Purchasing Division, Battle joined our buying staff in December 2014.

The procurement certification program identifies and honors agency procurement officers who have demonstrated the superior knowledge and skills necessary to perform and promote the public procurement function for the State of West Virginia.

State agency procurement officers who are interested in participating in the

program may review the program's requirements at [www.state.wv.us/admin/purchase/training/Certification](http://www.state.wv.us/admin/purchase/training/Certification).

Questions regarding the certification program should be directed to Communication and Professional Development Unit Manager Samantha Knapp at [Samantha.S.Knapp@wv.gov](mailto:Samantha.S.Knapp@wv.gov) or 304.558.7022.

The Purchasing Division would like to congratulate Battle on this noteworthy accomplishment and encourage others to pursue this professional endeavor.



**Purchasing Division Senior Buyer April Battle is the latest recipient of the West Virginia Procurement: Basic Certification. She joins more than 50 others in attaining the state basic procurement certification.**

# Purchasing Division's Inspection Services Function Ensures Compliance with State Law and Rule

*The Purchasing Division oversees all procurements expected to exceed \$25,000, but what about those purchases that fall under the agency's delegated authority? Agencies have the authority to make purchases of \$25,000 or less.*

The role of the Contract Management Unit within the Purchasing Division is to ensure that state agencies are in compliance with all state laws, rules and procedures for those smaller dollar purchases.

"We are here to help you help us," said State Contracts Manager Greg Clay. "Our goal when we visit an agency for an inspection is to review purchasing documents that were issued the previous year

by that agency to ensure those delegated purchases were completed accurately."

With a team of three, the inspectors provide additional assistance during their visits by offering one-on-one training to the agency to make sure the individuals processing purchasing transactions are knowledgeable of the state purchasing procedures in place.

"After each inspection, we sit down and talk to those state employees responsible for procurement and answer any questions they may have about the inspection, the procedures or the state requirements," Clay added.

*What can an agency expect once they*

*have been notified that a purchasing inspector has been assigned to visit their agency for an inspection?* "About two weeks before our visit, we provide the agency with a list of purchasing transactions for a specific time frame that we will be looking at," said Inspector Shane Hall. "We narrow down the total list of transactions that we generate from Business Intelligence within wvOASIS to approximately 4 percent of the agency's transactions."

Once the inspection of the documents is complete, a report is prepared and sent to the agency for its review and comments. The agency is given two weeks to agree or disagree with the findings. This response is included in the final report.

A grading system, which assigns inspected agencies with an A to F based grade on their inspection's findings, was implemented last July to allow the Purchasing Division to more efficiently evaluate an agency's conformance to state law, rules and procedures. Additional information on this new grading system can be found in the August 2015 issue of *The Buyers Network*.

The Purchasing Division has the authority to review and audit spending unit requests and purchases and other transactions that fall under its authority, in accordance with the *West Virginia Code of State Rules* §148CSR1-4-16. The inspectors have access at all times to personnel, records, reports and other documents as needed.

During their visit, the inspectors look for documentation related to the use of internal resources and statewide contracts, when applicable; proper bid documentation; vendor registration; verification searches; purchase orders issued; asset tags on property; certifications of non-conflict of interest; and possible stringing activity. Stringing is issuing a series of requisitions or dividing or planning procurements to circumvent the \$25,000 threshold or otherwise avoid the use of competitive bidding.

For additional information on the inspection function, please visit the Inspection Services website at [www.state.wv.us/admin/purchase/inspection](http://www.state.wv.us/admin/purchase/inspection).

## Purchasing Division Implements Corrective Action Plans Following its Inspections

The Purchasing Division has implemented a Corrective Action Plan as part of its response following the inspection of West Virginia state agencies conducted by its Contract Management Unit. The Corrective Action Plan was developed as a result of the recommendations issued by the Legislative Auditor's Office following its audit of the Purchasing Division.

The purpose of the Corrective Action Plan is to address findings, such as stringing, the product or service's availability through statewide contracts, and bid documentation found during the inspection of agency delegated purchases. Following an inspection, the Contract Management Unit issues a report to the agency; the agency has an opportunity to submit its own comments regarding the findings. The Contract Management Unit then submits a final letter and, when issues are found, now a Corrective Action Plan to the agency. The agency has 60 days from the date of the final report to submit a response to the Purchasing Division.

"The Corrective Action Plan was implemented in response to the identification of potential sources of non-conformity for spending unit procurements during the Legislative Audit," said Greg Clay, manager of the Contract Management Unit. "The purpose of the plan is to monitor and improve upon the processes used to eliminate the recurrence of issues and findings in the agency inspection report and to ensure conformance with state purchasing rules and regulations."

The Contract Management Unit will keep the Corrective Action Plan in the agency's file. The inspectors will follow up on agency-delegated transactions in wvOASIS utilizing *Business Intelligence* to observe whether an agency is following purchasing guidelines and procedures. In addition to keeping the Plan in the agency's file, the Contract Management Unit will refer to it during the next inspection to examine whether an agency has adhered to the plan.

"The main focus of the Contract Management Unit is to make an agency aware of a finding or issue so that the agency can identify ways to prevent it from recurring. Ultimately, we want to help agencies follow the procedures in the Purchasing Division Procedures Handbook so that they procure goods and services in accordance with West Virginia Code," concluded Clay.





## Change Order Process Not Required for Contract Accounting Adjustments

West Virginia state procurement provides a process for state agency procurement officers to make changes to contracts when necessary, including those which affect the payment provision, time for completion of the work, and/or scope of the work.

These changes require approval of both the vendor and the State (bilateral change) and are documented through the official change order process. In accordance with the *Purchasing Division Procedures Handbook*, change orders are used when it becomes necessary to amend, clarify, or cancel purchasing documents.

Sometimes, however, it may become necessary to make a change that does not reflect on the face of the contract. In other words, the change does not require vendor input of any sort. This type of change, which only involves one of the parties, is known as a unilateral change.

One common unilateral change often made by our state agencies is the contract's source of funding, or the pool of money from which the state agency intends to pay for the product or service. This change is strictly accounting in nature and does not require central procurement workflow approval.

All other changes to procurement documents must be submitted into central workflow approval as a formal change order request. Please note the issuance of a Notice to Proceed is not considered to be

an accounting adjustment because it impacts effective dates.

"Accounting adjustments, such as those which change the Object Code on a contract, are unilateral contract changes to chart of account elements not seen by the vendor," said Assistant Purchasing Director Mike Sheets. "Therefore, to process these adjustments as a change order would cause unnecessary confusion and misunderstanding by the vendor. Instead, the WV OASIS Finance Team can assist agencies with these changes, without involving unnecessary parties, to ensure accurate and complete information in the contract file."

When an agency is required to make a unilateral contract change, such as an accounting adjustment, the agency may work directly with the WV OASIS Finance Team by e-mailing [FinanceTeam@wvoasis.gov](mailto:FinanceTeam@wvoasis.gov). This will ensure that changes are made consistently and carefully.

Detailed instructions for processing Accounting Adjustments to central procurement documents can be found on myApps under Enterprise Readiness – Outreach Sessions – Procurement – UPDATES. The instructions were recently updated to include steps for liquidating unused pre-encumbrances that are linked to awarded Centralized Requisition (CRQS) documents.

## CONFERENCE

Continued from Page 1

the contracted room rate.

This year, the conference agenda will again offer a Newcomer's Orientation, the opportunity to choose from more than 25 key procurement-related topics for a customized schedule, and a Beginner's and Advanced Track. The Beginner's Track, which previously consisted of six sessions, has been expanded to include a seventh session on Purchasing Inspections.

Several sessions will be new this year. Those classes include Purchasing Ethics, Construction Purchases, Technical Purchases, and Specification Drafting for the Seasoned Procurement Professional, with the latter being offered exclusively during the Advanced Track. In addition, a self-led Certification Study Group will be offered for agency purchasing personnel wishing to participate in the West Virginia Procurement Certification Program.

The conference registration fee, set at \$175, will cover all conference materials, group meals, administrative costs and attendance to all workshop sessions. Payment is accepted online at the time of registration. The preferred method of payment is the State Purchasing Card. For additional payment options, please contact Debbie Watkins at 304.558.3568 or [Debbie.A.Watkins@wv.gov](mailto:Debbie.A.Watkins@wv.gov).

Please note that any procurement officer who received his or her basic certification prior to November of 2014 is required to attend this year's conference if that individual did not participate in the 2014 Agency Purchasing Webinar Conference or the 2015 Agency Purchasing Conference.

For information regarding this re-certification requirement, please see the re-certification guidelines on the Purchasing Division's website at [www.state.wv.us/admin/purchase/training/certification](http://www.state.wv.us/admin/purchase/training/certification) or contact Administrative Services Manager Samantha Knapp at 304.558.7022 or [Samantha.S.Knapp@wv.gov](mailto:Samantha.S.Knapp@wv.gov).

Additional information will be shared on the Purchasing Division's conference webpage at [www.state.wv.us/admin/purchase/Conference/Agency/2016](http://www.state.wv.us/admin/purchase/Conference/Agency/2016) as it becomes available.

## Purchasing Welcomes Newest Employee



**Jessica Riley**  
Purchasing Assistant

The Purchasing Division is pleased to welcome Jessica Riley to its staff. Riley joins the division as a purchasing assistant in the Acquisitions and Contract Administration Section.

A resident of Saint Albans, Riley attended Saint Albans High School and is currently pursuing a degree in Multiple Disciplinary Studies from West Virginia University. Before joining the Purchasing Division, Riley worked for the Real Estate/Parking Division and handled parking for the Capitol Complex and the various state agencies.

Riley also worked at Sephora in sales and cosmetology and continues to enjoy applying makeup for weddings, proms and other special events. A trivia buff,

Riley also enjoys cooking and baking in her free time.

Please welcome Jessica to the Purchasing Division family!

# Purchasing Remembers Former Procurement Officer of the Year



**Lendin Conway**  
1942-2016

It is with great sadness that the West Virginia Purchasing Division shares the passing of Lendin Conway, a retiree from the Department of Environmental Protection with 35 years of service. In 2002, Conway was recognized as the *West Virginia State Procurement Officer of the Year*.

Conway, a faithful member of Faith Missionary Baptist Church, leaves behind a large family. Family and friends are encouraged to share stories of Conway on his tribute page at [www.chapmanfuneralhomes.com](http://www.chapmanfuneralhomes.com) or by making a contribution to the Faith Missionary Baptist Church

in honor of his faithful work with youth there.

The Purchasing Division sends its condolences to Conway's family and friends during this difficult time.

## wvOASIS Travel Module Now Operational for Wave 1 Agencies

The wvOASIS Travel Module was launched on April 1<sup>st</sup> for Wave 1 agencies. Those agencies should be aware of the steps necessary to take when processing Travel Authorizations and Expense Reports in the new module.

"We recommend that people first watch the training videos, which offer step-by-step instructions for completing the most common scenarios in the Travel Module," said Kelley Smith, director of e-travel for the West Virginia State Auditor's Office.

Smith also suggested that agency personnel read through the *E-Travel Quick Reference Guide*, *Traveler FAQ*, and *Travel and Expense Reporting Employee Self Service User/Training Manual*, which all supplement the training videos with more detailed information about the functionality of the system. These documents and videos are posted on myApps under the Training link within Enterprise Readiness. Simply click Travel in the left drop-down menu and Employee Travel in the right drop-down menu.

Wave 2 is expected to roll out during the second quarter of Fiscal Year 2017. Information regarding Wave 2 implementation will be made available at a later date; however, Wave 2 agencies are encouraged to review the aforementioned training materials.

If users have issues that are not security related, they should e-mail the E-Travel Unit at [pcard\\_travel@wvsao.gov](mailto:pcard_travel@wvsao.gov). When contacting the E-Travel Unit, users should also send screen shots with document numbers and be as detailed as possible regarding the issue they are experiencing.

Please choose a Section and Sub-Section from the dropdowns below.

Description	Event Name	Event Date
<input type="text" value="Travel"/> <input type="text" value="Employee Travel"/>		
Advanced Traveler Simulation 3.2 - Updating Booking Tool Profile Information	Simulation Video	03/23/2016
Advanced Traveler Simulation 3.3 - Creating a Travel Authorization	Simulation Video	03/23/2016

Following the implementation of wvOasis's Travel Module, Wave 1 agencies are encouraged to review training videos and manuals posted on myApps.

## CANNIBALIZATION

Continued from Page 1

to be cannibalized:

- Inventory tag number;
- Original acquisition date and cost;
- Description of the asset;
- Whether the asset is operable and justification for cannibalization if it is;
- List of the individual(s) who will cannibalize the asset and their qualifications; and,
- What parts will be removed and how the agencies will dispose of any remaining parts.

The agency will also need to provide documentation with similar information for the asset to be repaired, including how the cannibalization will restore the asset to an operable condition and prepare a cost analysis of the repair without cannibalization.

"The form was updated to allow for additional justification for cannibalization," shared Perdue. "These updates will assist Surplus Property in determining whether or not cannibalization is in the best interest of the State."

To view the updated *Cannibalization Asset Request Form*, please visit [www.state.wv.us/admin/purchase/surplus/InventoryMgt/WV105.pdf](http://www.state.wv.us/admin/purchase/surplus/InventoryMgt/WV105.pdf).

### THE BUYERS NETWORK

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# Current Statewide Contract Update

(As of April 15, 2016)

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 [www.state.wv.us/admin/purchase/swc](http://www.state.wv.us/admin/purchase/swc). For more information, please contact the buyer assigned to the specific statewide contract.

## Contract Extensions

<b>Contract</b>	<b>Vendor</b>	<b>Commodity</b>	<b>Effective Date</b>
IPEQUIP	Alpha Technology, Inc.	IP Telephones, Licensing and Accessories	03/31/16 - 03/30/17

## Contracts Renewals

<b>Contract</b>	<b>Vendor</b>	<b>Commodity</b>	<b>Effective Date</b>
FUEL14A	J.L. Brannon, Inc.	Fuel by Tank Wagon	04/01/16 - 06/30/16
FUEL14B	R.T. Rogers Oil Company	Fuel by Tank Wagon	04/01/16 - 03/31/17
FUEL14C	R.T. Rogers Oil Company	Fuel by Tank Wagon	04/01/16 - 03/31/17
FUEL14D	Belmont Petroleum Corp.	Fuel by Tank Wagon	04/01/16 - 03/31/17

SECSVS15	GS Secure Solutions USA, Inc.	Security Guard Services	05/01/16 - 04/30/17
DPS15*4	Motorola Solutions, Inc.	Dispatch Consoles/Components	04/01/16 - 03/31/17

## Miscellaneous Actions

<b>Contract</b>	<b>Vendor</b>	<b>Commodity</b>	<b>Description of Change</b>
TEMP14B	Saunders Staffing, Inc.	Temporary Staffing Services	To provide the attached revised pricing pages for Regions I through IV

## FOR MORE INFORMATION

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

## Purchasing Division's News Page Redesigned

The Purchasing Division's Technical Services Unit recently redesigned the Division's News Page on its website to help users find information in an easier and quicker way. The News Page was reformatted from a vertical listing of news, events, and job opportunities to a horizontal accordion tab style.

Now visitors to the Purchasing Division's website can easily find information on news, events or job postings by clicking the appropriate tab. The most recent updates are listed at the top of each tab's page. Therefore, visitors will no longer need to scroll down the page to find the latest information under each section.

This latest website update is just one of many that the Technical Services Unit has planned to make the site more user-friendly. Agency procurement officers are encouraged to check the website often to receive the latest information from the Purchasing Division.

To view the Division's redesigned News Page, *visit* [www.state.wv.us/admin/purchase/news.html](http://www.state.wv.us/admin/purchase/news.html). The Purchasing Division always welcomes comments and suggestions from our readers!

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