

# THE BUYERS NETWORK

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**THE BUYERS NETWORK**  
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## New Approach to Vendor Outreach Deemed a Success

The Purchasing Division tried a different approach to vendor outreach this fall, and the efforts were well received by all involved. Held on October 3, 2019, the Division organized a Vendor Open House to give the vendor community the opportunity to meet with representatives from several state agencies in one location. The event was held in the Capitol Room of Building 7 on the State Capitol campus, with informational sessions for vendors held in the adjoining Regents Room.

Approximately 185 vendors attended the event, with more than half attending one of the three 30-minute informational sessions to learn more about how to do business with the state. In addition to the Purchasing Division, other agencies represented included the Tax Department, the Secretary of State's Office, the Office of Technology, the Department of Environmental Protection, the Department of Transportation, the Finance Division, the Department of Health and Human Resources,



**The recent Vendor Open House drew approximately 185 attendees to the Capitol campus in October. Vendors were invited to attend informational sessions and meet with agency representatives. The Tax Department, Secretary of State's Office, and State Treasurer's Office were among the agencies represented at the event.**

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## Purchasing Employee Watkins Retires with 37 Years of Service

Since 1986, Debbie Watkins has been a familiar face at the Purchasing Division, but after more than 33 years with the Division (and 37 years with the state), Watkins has retired from state government.

Watkins began her career with the state of West Virginia in 1982 as a Typist 1 for the Budget Office. Prior to her transfer to the Purchasing Division, she also worked with the Information System Services Division and Department of Finance and Administration's Commissioner's Office. During this time, she primarily performed a variety of clerical, data entry, and secretarial duties.

In July 1986, Watkins accepted a position with the Purchasing Division as a Secretary 1 in which she served as a receptionist and performed various typing projects for the buyers. In August 1990, a reorganization within the Purchasing Division

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## A Change in the Season Brings Endings, New Beginnings

In my two years as purchasing director and my many more years with the Purchasing Division, there has been one constant that has seen me through the changing of the seasons. That constant has been Executive Assistant Debbie Watkins. From handling all personnel and human resource issues to purchasing goods and services for our Division and many tasks in between, Debbie was a jack of all trades. If you asked her a question, she always knew the answer or where to find it. She was the first contact all employees had with the Division, and the last. And she certainly always made things happen, whether you knew it or not. I want to take this opportunity to thank Debbie for her more than 35 years of public service as she transitions to retirement, an accomplishment for which she is most deserving! Congratulations, Debbie!

As we transition between staff, work continues elsewhere. With the Agency Purchasing Conference behind us, the Purchasing Division is focused on offering and participating in new outreach events this fall. On October 3, 2019, we offered our first ever Vendor Open House in which we brought together state agencies and current and prospective vendors. The goal was to allow state agencies to educate vendors on their requirements for doing business with the state of West Virginia and to allow vendors the opportunity to market their goods and services to agencies. Nearly 200 vendors attended the event, and representatives from 10 agencies participated. Following the Vendor Open House, we conducted evaluations among the two groups and plan to use that information in planning similar events in the future. For more on this event, see the article on Page 1.

On October 10, 2019, Assistant Purchasing Director Frank

Whittaker presented at the West Virginia Government Finance Officers Association where he discussed the requirements of construction as governed by West Virginia Code §5-22 and answered questions on best purchasing practices posed by political subdivisions. Later in the month, Purchasing Division personnel hosted a table at the annual Minority Business Expo and shared information on how to register with the Purchasing Division, where to find state solicitations exceeding \$10,000, and how to submit a bid.

Looking ahead, we'll be offering our high-level officials training on purchasing procedures and P-Card processes on November 7, 2019. However, we are at capacity for that webinar. Please advise those officials in your agency that the webinar will be recorded and posted on the Purchasing Division's website following the training. Individuals have until June 30, 2020, to complete this training to remain in compliance. Visit [www.state.wv.us/admin/purchase/training/mandatory.html](http://www.state.wv.us/admin/purchase/training/mandatory.html) for more information on this training.

As we move through fall, we encourage you to think about how change can work to your benefit, appreciate the constants in your day-to-day business, and give thanks for the positives that are cultivated as a result of each.



## What Are We Going to Do With All These Old Files?

*By Donna M. Lipscomb*

*Records Management Program Manager*

Many agencies accumulate or produce a large volume of documents daily. After a period of time, agencies find the records are no longer beneficial and want to destroy them to make room for newer records or to save on storage costs. However, what most employees are not aware of is that the law prohibits the destruction of any public records without prior approval.

The Public Records Management and Preservation Act, West Virginia Code §5A-8-1, requires each agency to have an approved records retention and disposal schedule which outlines how long an agency will keep each record type. So, before you destroy any records, you must consult your agency's retention schedule to ensure you have maintained the records for the required period of time.

Each agency has a records manager who is responsible for

managing the agency's records. If you are unaware of how long a particular record should be kept, contact your records manager or Donna Lipscomb, the state records management program manager, to obtain a copy of your agency's retention schedule. If the records have reached the end of the stated retention period, your records manager must submit a request to destroy the records to Donna Lipscomb at [Donna.M.Lipscomb@wv.gov](mailto:Donna.M.Lipscomb@wv.gov), as outlined in the Act, to start the approval process. You will be notified once the request to destroy records has been approved.

The state has two statewide contracts that are utilized for the shredding and destruction of records. The first is Record Management Services (RECMGT). The vendor for that contract is Iron Mountain. The other contract is WVARF State Use Approved Commodities and Services (WVARF). The vendor for

**Please see RECORDS MANAGEMENT, page 5**

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# Office of Technology Publishes List of Pre-Approved Items No Longer Requiring CTO Approval

The Office of Technology would like to make state agency procurement officers aware of a revised policy on items that do not require purchasing approval from the Chief Technology Officer (CTO), specifically for non-software and software technology procurements under \$2,500.

There are three major categories for items under \$2,500 that no longer require CTO approval. Please keep in mind this policy does not negate the requirement for competitive bidding, when appropriate. The categories include:

1. **Software listed below:**
  - Adobe DC Cloud PDF Writer
  - Nuance Power PDF Writer
2. **Removeable media:** however, procurement officers should work with the State Privacy Office on a Privacy Impact Assessment submission.
3. **All hardware items, except those listed below** (these items still require CTO approval):
  - Routers
  - Wireless access points

- Ethernet switches
- VoIP phones/equipment
- Circuits
- PCs and tablets that are not on the IP19 statewide contract

Hardware purchases have two caveats of which agency procurement officers should be aware. The first is that procurement officers should continue to follow the statewide contract ordering instructions for statewide contract purchases under \$2,500 that contain hardware.

Next, any Bill of Material (BOM) previously received from the Office of Technology telling your agency what to purchase does not need to go back through the CTO approval process as long as your agency orders the item matching the item number on the BOM and the BOM is not expired. Moving forward, each BOM will have a 60-day expiration date when issued by the Office of Technology.

This revised information can be found as Appendix B in CTO Policy No. CTO-19-001, which can be viewed at <https://technology.wv.gov/SiteCollectionDocuments/CTO-19-001%20Policy.pdf>.

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## WATKINS RETIREMENT

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saw Watkins assigned as a secretary to Assistant Director Dave Tincher and transitioned to the position of Administrative Secretary in May 1997 when he was named Director of Purchasing.

"I have been so very blessed to have a career that I really enjoy," shared Watkins. "It has been gratifying, rewarding, and sometimes even challenging. I have also been very fortunate to have worked under the leadership of both retired Purchasing Director Dave Tincher and current Purchasing Director Mike Sheets. Throughout the years, I have made many good friends within the division and other state agencies."

Over the last 30 years with the Purchasing Division, Watkins has been responsible for numerous administrative duties such as



human resources, travel, payroll, procurement, correspondence, and the scheduling of meetings, travel, and logistics for the direc-

tor and purchasing staff. Watkins served as part of the Purchasing Division's conference coordinators team since 1994. Each of these tasks has required Watkins to interact with all areas within the Purchasing Division.

In 2018, she earned her Certified Administrative Professional credentials by the International Association of Administrative Professionals and was also a recipient of the WV Procurement: Basic Certification.

As a resident of Ravenswood, WV, Watkins has had a long commute to Charleston over the years. As she prepares for the next chapter of her life, she said she plans to relax and see what opportunities present themselves.

"I will be happy to spend more time with my family and look forward to being able to work on various projects around the house," said Watkins. "I also love to sew and work on quilting/craft projects, so I don't believe I will be bored. Eventually, I plan to look for some part-time or full-time work close to home."

Thank you, Debbie Watkins, for your many years of service and friendship here at the West Virginia Purchasing Division.

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**Debbie Watkins has retired from state government with 37 years of public service; 33 of those were spent at the Purchasing Division. Watkins played an important role within the Purchasing Division and will be greatly missed. We wish you all the best in this new chapter!**

# Purchasing Division Provides Guidance on Exceptions Taken to Terms, Conditions, and Specifications

Terms, conditions, and specifications form the majority of contracts in the competitive bidding process. Terms and conditions serve as the provisions that establish the state of West Virginia's general contracting terms. Every state agency under the Purchasing Division's authority uses a standard set of master terms and conditions drafted by the Division that cover everything from the contract term and required documents, to acceptance, termination, and cancellation of the contract. Specifications form the core of the actual performance obligations, and unlike the terms and conditions, vary greatly from one solicitation to another.

"When a vendor submits a bid, it is our preference that the vendor simply agree to all terms, conditions, and specifications, but despite our best efforts, that does not always happen. When a vendor does take exception or expresses an objection, it is something that we must deal with," said Purchasing Division General Counsel Jimmy Meadows.

Accordingly, the Purchasing Division would like to offer guidance to state agencies when exceptions are taken during the bidding process.

Those objections or exceptions typical-

ly present in two forms. The first is a vendor including strikethroughs, insertions, and notations on the bid documents and including those modified bid documents when submitting its bid. The second is the inclusion of a separate document in the vendor's bid that specifically identifies all objections and exceptions.

Regardless of how the objections and exceptions are presented, it is imperative that the agency procurement officer and bid evaluators identify those objections and exceptions when they occur. Once identified, the agency must include those in its overall evaluation. In some cases, it may be possible to consider a bid that contains these objections and exceptions. In others, particularly when the vendor objects or takes exception to mandatory specifications, the state will have no choice but to reject the bid.

It is imperative that the agency determine whether any objection or exception within the proposed bid violates any mandatory specifications. If it does, a lengthy negotiation need not occur. The agency would simply include the missed mandatory as reason for recommending rejection of the bid. If terms and conditions are the issue rather than specifications,

the Agreement Addendum (WV-96) can be utilized to correct most objections and exceptions. If questions exist about how to proceed, the Purchasing Division is happy to assist.

"What cannot happen is an agency seeing objections or exceptions and immediately forwarding that information to the Purchasing Division without any further evaluation," Meadows continued. "It is faster for all parties if the agency actually reviews and evaluates objections and exceptions before sending them on to the Purchasing Division."

Agencies should also be aware of products and services that often have additional terms associated with them, such as software. If the additional terms and conditions have not been received by the agency prior to the evaluation process, the agency should request those for consideration.

During the evaluation of bids, the agency should involve its legal counsel, if applicable, to ensure the grounds for its legal position are adequate. If questions still exist after the agency completes its evaluation and inquires of its legal counsel, the Purchasing Division can provide additional guidance.

## New Statewide Contracts Awarded for Classes 20-39 Motor Vehicles

The Purchasing Division recently awarded new statewide contracts for heavy trucks, to include Classes 20-39 motor vehicles. Examples of a Class 30 (top) and a Class 27 (bottom) heavy trucks can be seen to the right. The contracts, MVTRUCK20, became effective October 15, 2019.

The contracts, dependent on weight and class, were awarded to the respective vendors listed below:

- MVTRUCK20A...Stephens Auto Center
- MVTRUCK20B...Matheny Motor Truck Co. dba Matheny Ford, LLC
- MVTRUCK20C...Matheny Motor Truck Co.
- MVTRUCK20D...Whiteside of St. Clairsville

To view these contracts for trucks, please visit [www.state.wv.us/admin/purchase/swc/MVTRUCK.htm](http://www.state.wv.us/admin/purchase/swc/MVTRUCK.htm).

Should you have any questions regarding these contracts, please contact Senior Buyer Mark Atkins at [Mark.A.Atkins@wv.gov](mailto:Mark.A.Atkins@wv.gov).

For additional information on all statewide contracts, visit [www.state.wv.us/admin/purchase/swc](http://www.state.wv.us/admin/purchase/swc).

Buyers Network



# Procurement Officer Profile: Hapney Finds Reward in Job

Melissa Hapney has worked for the state since 2002, where she began as an Accounting Technician II for the Public Employees Insurance Agency. During her time with the state, she has served in many different positions, including Administrative Services Manager for the Fire Commission. Mrs. Hapney said her experience has provided her with many challenges which have also led to enjoyment in her job.

"I love a challenge, and I have definitely had some challenges over the years," Mrs. Hapney said. "Now being part of a brand-new agency, the Division of Administrative Services (DAS), and helping to develop the Accounts Payable section is something that I look forward to."

Though recently moved into the Accounts Payable Supervisor position within DAS, Mrs. Hapney continues to serve as the Fire Commission's procurement officer and Purchasing Card Coordinator.

Mrs. Hapney values the experiences she has had working for the state and sees them as very rewarding.

"The most rewarding thing is learning new things and meeting new people," she continued. "I have met some of my most treasured friends from my various positions within the state."

Mrs. Hapney was born and raised in West Virginia, hailing from Saint Albans. In her spare time, she enjoys spending time with her family, which includes her husband of 32 years, two sons, and her 22-month-old grandson.



**Melissa Hapney,  
Administrative Services**

## VENDOR EVENT

Continued from Page 1

the State Treasurer's Office, and Surplus Property.

"In years past, we have conducted a *How to Do Business with West Virginia* vendor webinar," said Acting Assistant Purchasing Director Samantha Knapp. "This year, we decided to change it up to see what kind of response we would get. The energy in the room and the discussions held between vendors and state agencies was even better than we had hoped for. We look forward to what the future holds for this event."

According to an evaluation conducted following the event, vendors agreed.

"This open house was very well thought out and had a great amount of information that we can use to help enhance what the state is trying to achieve," said one vendor who attended. "We hope to be part of the state's objectives when it comes to our products and services."

## RECORDS MANAGEMENT

Continued from Page 2

that contract is PACE Enterprises of West Virginia, Inc. However, you must have approval to destroy the records prior to utilizing their services.

What if your agency does not have an approved Records Retention and Disposal Schedule? If that is the case, a schedule must be established as soon as possible as it is a statutory requirement that each agency have a schedule and seek approval before destruction of any public records. What if your agency's approved records retention schedule does not include the type of records you wish to destroy? The retention schedule must be modified to include those record types and resubmitted for approval prior to requesting destruction of those records.



Please remember that modern records include electronic files and not just paper records. As technology progresses, we are generating, maintaining, and storing more records electronically. The same laws apply to electronic records that apply to paper records and must be handled in the same manner. No electronic records can be destroyed without prior approval.

If you have any questions about records management issues, contact Donna Lipscomb at 304.957.8168 or [Donna.M.Lipscomb@wv.gov](mailto:Donna.M.Lipscomb@wv.gov).

## THE BUYERS NETWORK

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# Current Statewide Contract Update

(As of October 17, 2019)

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 statewide contracts.

## New Contracts

<u>Contract</u>	<u>Vendor</u>	<u>Commodity</u>	<u>Effective Date</u>
MVTRUCK20A	Stephens Auto Center	Motor vehicles	
MVTRUCK20B	Matheny Motor Truck	Motor vehicles	

MVTRUCK20C	Matheny Motor Truck	Motor vehicles
MVTRUCK20D	Whiteside of St. Clairsville	Motor vehicles

## Contract Renewals

<u>Contract</u>	<u>Vendor</u>	<u>Commodity</u>	<u>Effective Date</u>
SWC*26	Taylor & Blackburn Battery Co M	Batteries and accessories	11/30/19 -11/29/20
ESRI19	Environmental Systems Research Institute Inc	Geographic information systems	To publish updated pricing pages

## Purchasing Division Participates in 6<sup>th</sup> Annual Minority Business Expo Held in Charleston



On October 22, 2019, Purchasing Division staff participated in the 6<sup>th</sup> Annual Minority Business Expo (MBExpo) held at the Charleston Coliseum and Convention Center. The event was coordinated by the Herbert Henderson Office of Minority Affairs (HHOMA).

The MBExpo is offered each year to provide an opportunity for minority business owners and entrepreneurs to network and receive free education on how to grow their business. During the event, Vendor Registration Coordinator Gail Montantez and Senior Buyer April Battle maintained an informational booth where attendees could learn how to register with the Purchasing Division, view state solicitations, and submit a bid.

To learn more about the HHOMA, visit [www.minority-affairs.wv.gov](http://www.minority-affairs.wv.gov).

## FOR MORE INFORMATION

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

<b>BUYER</b>	<b>E-MAIL</b>	<b>PHONE</b>
<u>Supervisors</u>		
Tara Lyle	Tara.L.Lyle@wv.gov	558-2544
Guy Nisbet	Guy.L.Nisbet@wv.gov	558-2596
Linda Harper	Linda.B.Harper@wv.gov	558-0468
<u>Senior Buyers</u>		
Mark Atkins	Mark.A.Atkins@wv.gov	558-2307
April Battle	April.E.Battle@wv.gov	558-0067
Jessica Chambers	Jessica.S.Chambers@wv.gov	558-0246
Stephanie Gale	Stephanie.L.Gale@wv.gov	558-8801
Crystal Husted	Crystal.G.Husted@wv.gov	558-2402
Brittany Ingraham	Brittany.E.Ingraham@wv.gov	558-2157
Melissa Pettrey	Melissa.K.Pettrey@wv.gov	558-0094
<u>Buyer</u>		
Dusty Smith	Dusty.J.Smith@wv.gov	558-2063

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