

THE BUYERS NETWORK

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Purchasing Division and WVOT Work Together to Modify Existing RFP Approval Request Form

The Purchasing Division has made a modification to the *RFP Agency Approval Request* (WV-110) template to include Chief Information Officer (CIO) approval, if necessary.

While reviewing the CIO Approval Policy, the West Virginia Office of Technology (WVOT) recognized that CIO approvals throughout the RFP process were confusing for agencies. WVOT requires CIO Approval at three different stages in the RFP process: concept, release, and award. Of those, the concept stage has been the most commonly missed approval.

“In an effort to prevent this as much as possible, the WVOT worked with the Purchasing Division to add a section to the WV-110 form. It will now have check boxes to remind agencies to obtain CIO Approval at the initial planning stages, when applicable,” said Andrew Lore, IT procurement and business services manager. “Agencies will continue to submit the RFP through CIO Approval at the release and award stages as well.”

The RFP Approval Request template can be found on the Purchasing Division’s website in the Forms section. It can also be downloaded at www.state.wv.us/admin/purchase/Documents/RFPpacket_RFPRequest.docx.

WV-110
Revised 11/15/2023

West Virginia Purchasing Division
REQUEST FOR PROPOSAL:
Agency Approval Request

Instructions
Statutory Authority: Pursuant to W. Va. Code §5A-3-10b, and W. Va. CSR §148-1-7.7, a state agency may request, and the Director of the Purchasing Division may approve, the use of a request for proposal provided that certain requirements are met. Those requirements have been incorporated into this request form.
Agency Request: By submitting this form, the agency identified below is requesting that the Purchasing Division grant permission to utilize the request for proposal method of procurement. The requesting agency must completely fill out the form and include any additional documentation that supports its request when submitting this form.

Requestor Information
- Agency / Department: _____
- Procurement Officer: _____
- Date of Request: _____

General Information
- Description of service being sought with RFP: _____
- Estimated Budget (Spend through contract established by RFP): _____

Please check the appropriate box regarding CIO approval for this RFP request.

- This RFP requires CIO approval at the conceptual phase, which has been submitted with this request.
- This RFP does not require CIO approval.

INSIDE...

- Director's Comments: Purchasing Division Reflects on 2023, Looks Ahead
- Purchasing Division's Clay Transfers to New Position
- Training Schedule Announced for First Half of 2024
- Tracking of Training Hours Available on CourseMill
- WVSASP Welcomes New Federal Property Manager

Purchasing Division Hosts Fourth Quarterly Call

Approximately 140 agency representatives participated in the Purchasing Division’s fourth quarterly call on Nov. 14, 2023. These calls are a means to keep procurement officers informed of laws, rules, procedures, and other current events in the Purchasing Division.

The call was held via Google Meet and featured a slideshow presentation and speakers from the Purchasing Division. The agenda included information on the federal property management system, requisition issues, and terms and conditions. There was also a debrief on the Agency Purchasing Conference held in October.

Former WVSASP manager Greg Clay introduced new Federal Property Manager Michelle Barnes during the call before providing information about the Personal Property Management System. Buyer Supervisor Tara Lyle explained common issues seen by the Purchasing Division on agency requisitions, as well as how to process change orders.

Please see **QUARTERLY CALL**, page 4

Purchasing Division Reflects on 2023, Looks Ahead

Do you ever feel like the days just fly by and it's almost impossible to find the right work/life balance? I've always been a forward thinker. With Thanksgiving in the rearview mirror and the new year right around the corner, I've been thinking... a lot. How do I want to be seen as a person, an employee, and a leader, and do my actions align with those attributes?

I want to be a continuous learner, maintain my integrity, and practice healthy boundaries. I want to be flexible and open-minded but firm when appropriate. Most importantly, I want to be someone that others can rely on. That includes making it easier for our procurement officers and Purchasing Division employees to do their jobs.

Who do you want to be as a person and employee? In this issue, we are asking you to tell us what your goals are for the new year, both personally and professionally. The responses will be shared in our January issue of *The Buyers Network*. For information on how to submit your response, see the box on page 6.

As a division, here are our goals for the new year:

- Improve communication with agency procurement officers
- Continue to increase efficiency in the procurement process
- Utilize agency partnerships to harness knowledge and best practices in procurement and professional development

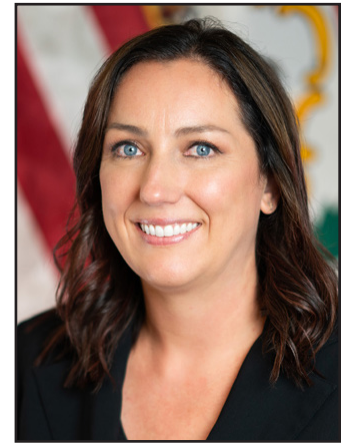
Last month, we welcomed Greg Clay back to the Purchasing Division offices as the assistant purchasing director of the Business and Technical Services section. Greg served for nearly a year as the manager of the West Virginia State Agency for Surplus Property. During that time, he helped create efficiencies in the process, from property retirement to requesting federal property. I have no doubt that Greg's knowledge and experience will further help the Purchasing Division and look forward to all that he accomplishes in the new year.

While the use of forms is part of our everyday lives, we often consider how these forms will serve our agency procurement officers for the better and make changes when needed. With the West Virginia Office of Technology's input, the Purchasing Division recently made revisions to the *RFP Agency Approval Request* (WV-110) template. As part of the RFP process, CIO approval is required at three different stages: concept, release, and award. Of those, the concept stage is the most commonly missed approval, when applicable. The goal of this update is to assist agencies with submitting a complete RFP request package, including the necessary approvals. To learn more about these updates, see the article on page 1.

As you plan ahead for 2024, remember all that the Purchasing Division has to offer. We will continue to distribute our weekly purchasing tip, offer our quarterly conference calls, and work toward creating more on-demand training.

I'm also pleased to announce that registration is now open for our first Semester Training Program sessions for 2024. We will continue to take a hybrid approach to offer agencies multiple avenues to participate in training. For more on these offerings, see the article on page 3.

I hope you all have a great holiday season. As always, please don't hesitate to reach out with any questions, concerns, or ideas you may have. We hope to hear from and/or see you soon!



Purchasing Division's Clay Transfers to New Position



Greg Clay
Assistant Director

The Purchasing Division is welcoming a familiar face back to its offices in Building 15. Greg Clay has been named Assistant Director of the Business and Technical Services section, replacing Guy Nisbet, who retired in October 2023. Clay formerly served as the manager of the West Virginia State Agency for Surplus Property in Dunbar. He came to the Purchasing Division in 2014 as a senior buyer before being promoted to contracts manager and then to a buyer supervisor position.

"It was a difficult decision to leave Surplus because I've really enjoyed working with ev-

eryone here. It's hard to leave a place where you like coming to work every day," Clay said. "But I'm excited to work with people at Purchasing who I've worked with before, but this time it will be in a new capacity. It's a new challenge."

Clay earned a bachelor's degree from Concord University in business administration with a concentration in accounting. Prior to his state government career, Clay worked in procurement and inventory control in the mining industry for more than 20 years.

Training Schedule Announced for First Half of 2024

Registration is now open for the first semester of the Purchasing Division's 2024 training program.

Courses for the first half of 2024 are hybrid sessions, which offer the option of attending either in-person or via webinar. One session, "An Intro to WV Purchasing," on March 6, 2024, is in-person only. It will be held in the Regents Room in Building 7.

"The schedule includes topics that are beneficial to both new and experienced procurement officers, and will help those who are interested in Basic Certification to meet the core curriculum requirements," said Deputy Director Samantha Knapp.

"Attendance at our in-person sessions never bounced back to the pre-pandemic numbers, so offering hybrid sessions is our way of meeting people where they are. If people feel more comfortable attending training from their offices, we want to give them that option."

To register for any of these training sessions, visit www.onlinelearning.wv.gov and log in with your User ID (i.e. your A, B, or E number) and password. Once logged in, click on the Course Catalog tab and search for the courses that begin with the ID "PUR" or simply type the Catalog ID for the course you're interested in into the Catalog ID field. If you have

not logged into CourseMill previously, your password should be "password." You will be prompted to change it once logging in. If you can't remember your password, simply click on the "Forgot your User ID or Password?" button and you will receive an email to reset your Password.

All sessions are worth one credit per one hour of training for the 10-hour training requirement for designated procurement officers, per §148 C.S.R. 1-3.2.

To view a copy of the posted 2024 Training Program schedule, visit www.state.wv.us/admin/purchase/training/2024TrainingSchedule_Web_1stHalf.pdf.

DATE	CLASS/EVENT TITLE	CATALOG ID (IN-PERSON)	CATALOG ID (WEBINAR)	TIME
Jan. 10	Preparing and Evaluating RFPs	PUR303	PUR303W	9 a.m. - 11:30 a.m.
Jan. 24	Contracting Basics/Tools and Resources	PUR405	PUR405 / PUR405W	9 a.m. - 11 a.m.
Feb. 6	Quarterly Call*	N/A	N/A	9:30 a.m. - 11 a.m.
Feb. 7	Electronic Business with WV	PUR105	PUR105W	10 a.m. - 11:30 a.m.
Feb. 28	Forms and Docs/Inspections	PUR309	PUR309W	9 a.m. - 11 a.m.
March 6	Intro to Purchasing	PUR102	N/A	9 a.m. - 4 p.m.
March 20	<i>Alternative Procurement Methods</i>	PUR409	PUR409W	10 a.m. - 11 a.m.
April 24	Purchasing as a Privacy Powerhouse	N/A	PUR201W	10 a.m. - 11:30 a.m.
May 8	<i>Vendor Registration</i>	PUR111	PUR111W	9 a.m. - 11:30 a.m.
May 21	Quarterly Call*	N/A	N/A	9:30 a.m. - 11 a.m.
May 22	<i>EOIs and Construction</i>	PUR302	PUR302W	9 a.m. - 11 a.m.
June 5	<i>Solicitation Process: From Planning to Post Award</i>	PUR202	PUR202W	9 a.m. - 12 p.m.
June 26	WVOT Requirements	N/A	PUR217W	10 a.m. - 11 a.m.

*Designates non-training event

Tracking of Training Hours Available on CourseMill

The Code of State Rules requires agency designated procurement officers to take 10 hours of training offered by the Purchasing Division annually, and the state's learning management system, CourseMill, makes it easy for participants to track their hours and courses.

While CourseMill is used as a registration tool for the Purchasing Division's training sessions, it also serves as a transcript for any courses that have been completed. Following each session, Purchasing Division staff update the participant's status to "Complete." This allows procurement officers to track their own training participation for the year.

To view the transcript of completed trainings, individuals should log in at www.onlinelearning.wv.gov and click on the "Transcript" tab on the left-hand side of the page. All completed courses will be listed. Please note that this includes all courses taken through CourseMill and it is the procurement officer's responsibility to identify which were hosted by the Purchasing Division. This report can be downloaded or printed. Certificates of completion for individual classes can also be printed.

"So often, we are asked by agency procurement officers how many hours

they have for the current fiscal year as they try to gauge how many hours they still require," said Deputy Director Samantha Knapp. "With the exception of the annual conference workshops, which also count as training hours, we're happy that agency procurement officers have a method to track their own training hours that is in line with how the Purchasing Division would pull the information. This cuts out the time of procurement officers having to wait on the Purchasing Division to pull their transcript and gives them some autonomy when planning or meeting the requirements of the various rules and programs."

Those interested in obtaining basic certification are required to complete 15 hours of training, including a core curriculum of classes, while 30 hours are required for the advanced certification. Any individual that has obtained the West Virginia Procurement: Basic or Advanced Certification must participate in 20 hours of training offered by the Purchasing Division in the three years from the date they obtain that certification to comply with recertification guidelines. Questions on how to view your transcript or training hours within CourseMill can be directed to Purchasing.Training@wv.gov.

QUARTERLY CALL

Continued from Page 1

Buyer Supervisor Mark Atkins provided guidance to agency procurement officers on how to handle calls from vendors who want to do business with



the state and claim to be a statewide contract vendor, and Assistant Director Frank Whittaker highlighted important things to know about terms and conditions.

When asked in a survey to rate their overall opinion of the call, 79% of the respondents rated it a 9 or a 10 on a scale of 1 to 10, with the overall score averaging 9.21.

"I am always pleased with the information the Purchasing Division presents," said one respondent. "I liked that the call moved along at a steady pace and was respectful of participants' time," said another.

Additional comments included: "The topics were helpful for use in everyday work" and "Showing examples of the changes that are going to be made to our processes is a great tool for everyone."

Ninety-five percent of the respondents said they plan to participate in future quarterly conference calls organized by the Purchasing Division.

WVSASP Welcomes New Federal Property Manager

The West Virginia State Agency for Surplus Property (WVSASP) is pleased to welcome its newest employee, Michelle Barnes. Barnes joins WVSASP as the coordinator for federal property following the recent retirement of long-time employee Doug Elkins.

A resident of Charleston, Barnes previously worked as an assistant clerk for the Intermediate Court of Appeals. Barnes has a bachelor's degree in psychology and is currently pursuing a master's degree in organizational development and human resources.

"I am excited to join the team at Surplus Property," said Barnes. "I have more than 20 years of experience wearing various hats in the education, legal, real estate, and other business fields, and I'm looking forward to using the skills I've developed in my new role as the federal property manager. The team at WVSASP has been so welcoming and willing to help since I started. I am very



Michelle Barnes
Federal Property Manager

grateful for their support."

In her free time, Barnes enjoys spending time with family.

Welcome to WVSASP and the Purchasing Division!

Upcoming Dates to Remember

To register for the training dates below, visit www.onlinelearning.wv.gov and enter the course code listed below. For more information, contact Purchasing.Training@wv.gov.

RFQs from A to Z;
Statewide Contracts;
Market Research

Dec. 13, 2023
9 a.m. - 12 a.m.

Code:
PUR406 / PUR406W (Hybrid)

Weekly Tip Recap: [Click to View the Tip Email](#)

Date	Tip
Nov. 8	Familiarize yourself with the change order process by reviewing the Purchasing Division's on-demand training module on change orders. Then use and follow the Purchasing Division's <i>Change Order Instructional Guide</i> & <i>Standard Change Order Language</i> reference document each time you submit a change order to the Purchasing Division.
Nov. 17	Do not require supporting bid documents with the bid. If you think that any document must be required with the vendor's bid, please discuss it with your assigned Purchasing Division buyer first.
Nov. 29	Always conduct proper market research prior to any purchase, which can lead to faster procurements, lower pricing, and better vendor participation and performance.

Do you have an idea for a weekly tip?
Send it to us at Purchasing.Training@wv.gov.

THE BUYERS NETWORK

Purchasing Division
State Capitol Complex
2019 Washington St., East
Charleston, WV 25305-0130

Telephone: 304-558-2306
8:15 a.m. to 4:30 p.m. (M-F)

Jim Justice
Governor

Vacant
Director
Purchasing Division

Editors
Courtney Johnson
Samantha Knapp

Contributing Reporters
Jessica Chambers
Teresa Cutlip

Current Statewide Contract Update

(As of Nov. 17, 2023)

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. For more information, please contact Buyer Supervisor Mark Atkins.

Contract Renewals

<u>Contract</u>	<u>Vendor</u>	<u>Commodity</u>	<u>Effective Date</u>
LAR20	Microsoft	Software	10/31/23 -12/31/23

FOR MORE INFORMATION

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

BUYER	EMAIL	PHONE
<u>Supervisors</u>		
Mark Atkins	Mark.A.Atkins@wv.gov	558-2307
Tara Lyle	Tara.L.Lyle@wv.gov	558-2544
<u>Senior Buyers</u>		
John Estep	John.W.Estep@wv.gov	558-2566
Josh Hager	Joseph.E.Hageriii@wv.gov	558-8801
Crystal Hustead	Crystal.G.Hustead@wv.gov	558-2402
Larry McDonnell	Larry.D.McDonnell@wv.gov	558-2063
Melissa Pettrey	Melissa.K.Pettrey@wv.gov	558-0094
David Pauline	David.H.Pauline@wv.gov	558-0067
Toby Welch	Toby.L.Welch@wv.gov	558-8802
<u>Buyer</u>		
Brandon Barr	Brandon.L.Barr@wv.gov	558-2652

Buyers Network



What are your professional and/or procurement goals for the new year?

As we prepare for the start of the new year, it's time to make positive resolutions and set personal and professional goals. The Purchasing Division wants to know how you will make 2024 your best year yet in procurement. Write better specifications? Attend more training? Improve internal procedures? To submit your answer, visit <https://forms.gle/iMaANGBoWPxyb1F7>.

Expiring Statewide Contracts Tracking

(As of Nov. 17, 2023)

The following contracts are set to expire within 90 days. This information is for planning purposes and may not reflect the current status of a contract. For more information on these or other statewide contracts, please contact Buyer Supervisor Mark Atkins.

RENEWAL REQUESTED

DEBT23A	DEBT23E
DEBT23B	IP23
DEBT23C	SANPAP23
DEBT23D	

TO BE DETERMINED

AEBATTERY21	LAR20
FASTEN22	

A copy of this report can also be seen by visiting the Statewide Contracts webpage or by clicking here.