

# Step-by-Step Procurement Guide

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West Virginia Department of Administration

## Purchasing Division

2019 Washington Street, East  
Charleston, WV 25305-0130

Telephone: (304) 558-2306

In-State Toll-Free: 800-BIDS2WV (800-243-7298)

Fax: (304) 558-4115

[WVPurchasing.gov](http://WVPurchasing.gov)

[Purchasing.Help@wv.gov](mailto:Purchasing.Help@wv.gov)

# **1 REQUEST RECEIVED BY AGENCY PROCUREMENT OFFICER FOR GOOD OR SERVICE**

- 1a. Check mandatory contracts and set aside programs
- 1b. Research and understand the need

# **2 DETERMINE PROCUREMENT METHOD, TYPE, AND SPENDING THRESHOLD**

- 2a. Determine if one-time or recurring need
- 2b. Determine the most suitable procurement method for the purchase
- 2c. Determine if central v. delegated purchase

# **3 DEVELOP PROCUREMENT DOCUMENTS**

Documents vary based on procurement method and threshold but may include preparing specifications, documenting file, or preparing purchase order. See outline for more details.

# **4 ADVERTISE SOLICITATION, EVALUATE BIDS, AND/OR AWARD CONTRACT**

Steps to advertise or otherwise publish documentation vary based on the procurement method used but may include advertisement of the solicitation or intent to award. In some cases, such as emergencies, the agency may proceed with preparing the documentation and completing the work. See outline for more details.

# **5 COMPLETE POST AWARD REQUIREMENTS**

- 5a. Consider vendor protests
- 5b. Conduct contract management procedures
- 5c. Make purchasing documents available to Purchasing Division inspectors upon request

# **1. Agency procurement officer receives request from agency employee for good or service.**

**1a.** Check availability on mandatory contracts or through set aside programs. Statewide contracts. Open-end contracts. Correctional Industries. Sheltered workshops. If available, proceed with the purchase.

**1b.** Research and understand the need. Determine quantity, availability, vendors in market, potential competing goods/services, price range, agency's historic utilization and spend, etc. Talk to agency end users, conduct research on the current market, search the internet, talk to multiple vendors, issue an RFI, and/or review past purchases of the same or similar good/service.

## **2. Determine procurement method, type, and spend threshold.**

**2a.** Determine procurement type. This includes one-time purchases and recurring need.

**2b.** Determine procurement method needed. This includes RFQs, RFPs, EOIs, direct awards, emergency purchases, Section 9, and others.

**2c.** Determine the spending threshold. The agency considers aggregate spend to determine if the procurement will fall under agency-delegated or central purchasing procedures.

## **3. Develop procurement documents, if required based on spending threshold.**

**3a.** Delegated purchases \$50,000\* or less.

**3a.1.** If *RFQ* or *EOI* procurement method is used, the agency develops specifications and prepares the solicitation.

**3a.2.** If the *direct award* method is used, the agency completes the Direct Award for Consideration (WV-65A) form for solicitations between \$5,000 and \$50,000\*.

**3a.3.** If an *emergency purchase* is required, the agency properly documents the agency file and proceeds with the purchase.

**3a.4.** If the purchase falls under *Section 9: Impossible to Bid List*, the agency develops the contract documents, properly documents the file, and proceeds with the purchase.

**3a.5.** *RFPs* are not permitted at this level of purchase.

*Note:* Soliciting goods or services between \$0-\$5,000 require no bids or documentation. Three verbal bids and a purchase order are required for purchases of \$5,000.01 to \$20,000. Specifications and public advertisement in *wvOASIS* are required for purchases of \$20,000.01 to \$50,000\*.

*\*or \$100,000 if additional delegated authority granted*

Note: Direct awards in the amount of \$0-\$5,000 require no advertising or documentation.

**3b. Central purchases exceeding \$50,000\*.**

**3b.1.** If *RFQ*, *RFP*, or *EOI* procurement method is used, agency develops the specifications, prepares the requisition, and submits it to the Purchasing Division.

**3b.2.** If the *direct award* method is used, the agency completes the Direct Award for Consideration (WV-65) form and submits it and any supporting documentation to the Purchasing Division.

**3b.3.** If an *emergency purchase* is required, the agency seeks approval for the purchase from the purchasing director. If the emergency occurs outside of normal business hours, the agency attempts to obtain three bids, proceeds with the work, and follows up with the Purchasing Division on the next business day with justification and all documentation.

**3b.4.** If the purchase falls under *Section 9: Impossible to Bid List*, the agency develops the contract documents, properly documents the file, and proceeds with the purchase.

**4. Advertise solicitation, evaluate bids, and/or award contract.**

**4a. Delegated purchases \$50,000 or less.**

**4a.1.** If the *RFQ* procurement method is used for purchases between \$20,000.01 to \$50,000\*, the agency prepares the solicitation and advertises it in *wvOASIS*, evaluates the bids received, and awards the purchase order/contract.

**4a.2.** If the *EOI* procurement method is used, the agency advertises the solicitation in *wvOASIS*, evaluates and scores the proposals received, and conducts final negotiation of the contract. The Purchasing Division awards the contract.

**4a.3.** If the *direct award* method is used and the purchase will be between \$0 and \$5,000, no advertisement or documentation is required. The agency may proceed with the direct award. If the direct award purchase will fall between \$5,000.01 and \$20,000, the agency publishes the Direct Award for Consideration (WV-65A) form in *wvOASIS* for public notice. If a vendor expresses valid interest in providing the good/service, the solicitation will be competitively bid. If no vendor expresses interest, the agency proceeds with awarding the purchase order/contract.

**4a.4.** *Emergency purchases* at this level do not require public

*\*or \$100,000 if additional delegated authority granted*

advertisement, but the agency should attempt to obtain three bids and award to the lowest responsive vendor.

**4a.5.** If the purchase falls under *Section 9: Impossible to Bid List*, no advertisement is required. The agency develops the contract documents, properly documents the file, and proceeds with the purchase.

**4a.6.** *RFPs* are not permitted at this level of purchase.

*Note:* Soliciting goods between \$0-\$5,000 require no bids or documentation. Three verbal bids and a purchase order are required for purchases of \$5,000.01 to \$20,000. Specifications and public advertisement in wvOASIS are required for purchases of \$20,000.01 to \$50,000\*. Some exceptions apply. See Section 5 of the Purchasing Division Procedures Handbook for more information.

**4b.** Central purchases exceeding \$50,000\*.

**4b.1.** If *RFQ* or *RFP* procurement method is used, the Purchasing Division advertises the solicitation, the agency evaluates the bids and/or scores the proposals, and the Purchasing Division awards the purchase order/contract.

**4b.2.** If the *EOI* procurement method is used, the Purchasing Division advertises the solicitation in wvOASIS, and the agency evaluates and scores the proposals received and conducts final negotiation of the contract. The Purchasing Division awards the contract.

**4b.3.** If the *direct award* method is used, the Purchasing Division advertises the Direct Award for Consideration (WV-65) completed by the agency for public notice. If a vendor expresses valid interest in providing the good/service, the solicitation will be competitively bid. If no vendor expresses interest, the Purchasing Division proceeds with awarding the purchase order/contract.

**4b.4.** *Emergency purchases* at this level do not require public advertisement but the agency must seek approval of the purchasing director. If the emergency occurs outside of normal business hours, the agency attempts to obtain three bids, proceeds with the work, and follows up with the Purchasing Division on the next business day with justification and all documentation.

**5. Complete post award requirements.** Consider vendor protests, conduct contract management procedures, and make purchasing documents available upon request. Vendor protests have not been delegated to the agency. Forward any protests received to the Purchasing Division.

*\*or \$100,000 if additional delegated authority granted*

# Step-by-Step Procurement Flow Chart

**\*Or \$100,000 if additional delegated authority is granted**

**Step 1:** Agency procurement officer receives request to purchase good or service

**Step 1a.** Determine if good or service is available from a mandatory source. Mandatory sources include statewide contracts, agency open-end contracts, Correctional Industries, and Sheltered Workshops. *Section 3 of Procedures Handbook*

**If yes,** obtain good or service from the mandatory contract

**Step 1b.** If the good or service is not available from a mandatory source, conduct research to better understand the request/need/market. *Section 3 of Procedures Handbook*

**Step 2:** Determine the procurement method and aggregate spend for the same or similar good or service in previous 12 months. *Sections 5 and 6 of Procedures Handbook*

**\$5,000 or less**

No bidding required. Proceed with purchase of commodity or service. Does not apply to A/E services

**\$5,000.01 to \$20,000.00**

Verbal bid rules apply

**\$20,000.01 to \$50,000.00\***

**Step 3:** Develop procurement documents for procurement method and spend threshold. *Sections 3, 5, and 6 of Procedures Handbook*

**\$50,000.01\* and more**

**Step 4:** Advertise solicitation, evaluate responses, and/or award contract. *Sections 5 and 6 of Procedures Handbook*

**Step 5:** Complete post award requirements. These may include protests, contract management procedures, and making files and documentation available for inspection. *Sections 7 and 9 of Procedures Handbook*