



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia Master Agreement

Order Date: 06-28-2024

CORRECT ORDER NUMBER MUST
 APPEAR ON ALL PACKAGES, INVOICES,
 AND SHIPPING PAPERS. QUESTIONS
 CONCERNING THIS ORDER SHOULD BE
 DIRECTED TO THE DEPARTMENT
 CONTACT.

Order Number:	CMA 0201 0201 SEC2300000001 4	Procurement Folder:	1040362
Document Name:	INDEPENDENT FINANCIAL ADVISORY SERVICES	Reason for Modification:	Change Order No. 3 - to renew the contract.
Document Description:	INDEPENDENT FINANCIAL ADVISORY SERVICES		
Procurement Type:	Central Master Agreement		
Buyer Name:			
Telephone:			
Email:			
Shipping Method:	Best Way	Effective Start Date:	2022-07-09
Free on Board:	FOB Dest, Freight Prepaid	Effective End Date:	2025-07-08

VENDOR				DEPARTMENT CONTACT	
Vendor Customer Code:	00000104138			Requestor Name:	Joyce K Jones
PUBLIC RESOURCES ADVISORY GROUP INC				Requestor Phone:	(304) 558-4331
39 BROADWAY STE 1210				Requestor Email:	joyce.k.jones@wv.gov
NEW YORK	NY	10006			
US					
Vendor Contact Phone:	212-566-7800	Extension:			
Discount Details:					
	Discount Allowed	Discount Percentage	Discount Days		
#1	No	0.0000	0		
#2	No				
#3	No				
#4	No				

24
 FILE LOCATION

INVOICE TO	SHIP TO
ACCOUNTING SECTION DEPARTMENT OF ADMINISTRATION 2019 WASHINGTON ST E PO BOX 50121 CHARLESTON WV 25305-0121 US	DEPARTMENT OF ADMINISTRATION OFFICE OF THE SECRETARY 1900 KANAWHA BLVD E, BLDG 1 RM E119 CHARLESTON WV 25305-0120 US

7-1-24 6L

Total Order Amount:	Open End
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Purchasing Division's File Copy

TRUP 06/28/2024
PURCHASING DIVISION AUTHORIZATION
 DATE: Tara [Signature] 7/1/2024
 ELECTRONIC SIGNATURE ON FILE

ATTORNEY GENERAL APPROVAL AS TO FORM
 DATE: John S. Gray [Signature]
 ELECTRONIC SIGNATURE ON FILE

7/2/2024

ENCUMBRANCE CERTIFICATION
 DATE: [Signature] 7-3-24
 ELECTRONIC SIGNATURE ON FILE

Extended Description:

Change Order No. 03 is issued to renew the original contract according to all terms, conditions, prices, and specifications contained in the original contract, including all authorized change orders.

Effective date of renewal: 07/09/2024 through 07/08/2025

Renewal Remaining: 2 years

No other changes.

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
1	80101603			LS	0.000000
	Service From	Service To		Service Contract Amount	
				0.00	

Commodity Line Description: INDEPENDENT FINANCIAL ADVISORY SERVICES

Extended Description:



STATE OF WEST VIRGINIA
DEPARTMENT OF ADMINISTRATION

MARK D. SCOTT
CABINET SECRETARY

June 27, 2024

Thomas Huestis
Public Resources Advisory Group
117 Gayley Street, Suite 200
Media, PA 19063

Re: Renewal of Contract CMA 0201 SEC2300000001

Dear Mr. Huestis:

Please allow this letter to serve as a renewal of the contract for CMA 0201 SEC2300000001 – Independent Financial Advisory Service. The State of West Virginia hereby exercises its right of renewal according to the same terms, conditions, specifications, and pricing contained in the original contract including all authorized change orders.

The renewal shall run for a period of up to one (1) year effective July 9, 2024 through July 8, 2025. If you agree to this renewal, please sign below and return to my attention.

A Purchasing Affidavit is attached for your execution. Additionally, please provide a copy of the current Certificate of Liability Insurance for Public Resources Advisory Group.

Very truly yours,

A handwritten signature in blue ink, appearing to read "R. Paulson".

Robert P. Paulson
General Counsel
WV Department of Administration

Accepted by:

A handwritten signature in black ink, appearing to be initials "AW".

Senior Managing Director for Public Resources Advisory Group, Inc.

cc: Samantha Willis, WV Purchasing Division



MARK D. SCOTT
CABINET SECRETARY


STATE OF WEST VIRGINIA
DEPARTMENT OF ADMINISTRATION

W. MICHAEL SHEETS
DIRECTOR

PURCHASING DIVISION

MEMORANDUM

TO: Frank Whittaker, CPPB, Assistant Director, WV Purchasing Division

FROM: James Meadows, CPPO, General Counsel, WV Purchasing Division 

DATE: April 4, 2022

RE: HB 4499; Purchasing Affidavit; Interested Party Disclosure

Pursuant to your request, I have investigated the impact of the recently passed House Bill 4499 on the bidding/contract award process as it relates to the Purchasing Affidavit and the Interested Party Disclosure Form. More specifically, you asked if the buying staff would need to continue collecting the two forms for contracts put out to bid, but not yet awarded, prior to the law change. My conclusion is that continuing to collect those forms is not necessary.

House Bill 4499 was a bill sponsored by the Governor's office, and made effective from passage, that made changes to various provisions of the West Virginia Code to make the procurement process more efficient. Two notable changes are the elimination of the need to collect the Purchasing Affidavit (previously found in W. Va. § Code 5A-3-10a) and the Interested Party Disclosure form (previously found in W. Va. Code § 6D-1-2) prior to award. Since the need for those forms prior to award was statutorily driven, and the statutes have now been modified, I see no reason to continue collecting them.

Once concern was that the solicitations issued prior to the laws passage reference the applicable statutes and indicate that the two forms will be needed prior to award. Those references were found in term 37 and term 43 of the General Terms and Conditions. From a priority standpoint, the change to the law would certainly trump the solicitation's terms and conditions. To help explain that inaccurate statement and the lack of the two forms in the procurement file,

however, please request that procurement staff include a copy of this memo in all solicitation files that went out to bid prior to HB 4499 passing and contain the old versions of term 37 and term 43.

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Business Organization Detail

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PUBLIC RESOURCES ADVISORY GROUP, INC.

Organization Information								
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
C Corporation	7/1/2005		7/1/2005	Foreign	Profit			

Organization Information			
Business Purpose	5416 - Professional, Scientific and Technical Services - Professional, Scientific and Technical Services - Management, Scientific and Tech Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)		
Charter County		Control Number	77341
Charter State	NY	Excess Acres	
At Will Term		Member Managed	
At Will Term Years		Par Value	
Authorized Shares		Young Entrepreneur	Not Specified

Addresses

Type	Address
Local Office Address	39 BROADWAY , SUITE 1210 NEW YORK, NY, 10006
Mailing Address	39 BROADWAY , SUITE 1210 NEW YORK, NY, 10006 USA
Notice of Process Address	COGENCY GLOBAL INC. 128 CAPITOL STREET CHARLESTON, WV, 25301
Principal Office Address	39 BROADWAY , SUITE 1210 NEW YORK, NY, 10006 USA
Type	Address

Officers

Type	Name/Address
Director	EDMUND SOONG 11500 WEST OLYMPIC BOULEVARD SUITE 400 LOS ANGELES, CA, 90064
Director	THOMAS HUESTIS 39 BROADWAY, SUITE 1210 NEW YORK, NY, 10006
President	STEVE PEYSER 39 BROADWAY , SUITE 1210 NEW YORK, NY, 10006
Secretary	THOMAS HUESTIS 39 BROADWAY SUITE 1210 NEW YORK, NY, 10006
Treasurer	THOMAS HUESTIS 39 BROADWAY, SUITE 1210 NEW YORK, NY, 10006
Vice-President	EDMUND SOONG 11500 WEST OLYMIC BOULEVARD SUITE 400 LOS ANGELES, CA, 90064
Type	Name/Address

Annual Reports
Filed For
2024
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Date filed

For more information, please contact the Secretary of State's Office at 304-558-8000.

Friday, June 28, 2024 — 1:51 PM

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Keyword Search

For more information on how to use our keyword search, visit our help guide

Simple Search

Search Editor

Any Words i

All Words i

Exact Phrase i

e.g. 123456789, Smith Corp

"public resources advisory group inc" ×

Entity

Location

Status

Active

Inactive

Reset 



No matches found

Your search did not return any results for active records.

Would you like to include inactive records in your search results?

Search inactive

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COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

<i>Purchasing Division Use:</i> Buyer: <u>MPTR</u> Date: <u>6/28/24</u> Solicitation No. <u>CO#3</u> <u>Renewal</u>	Agency: WVDOA - Secretary's Office Procurement Officer Submitting Requisition: Shelia Gray Requisition No. CMA SEC23*01 - CO#3 PF No.: 1040362
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This checklist **MUST** be completed by a state agency's designated procurement officer and submitted with the Purchase Requisition to the Purchasing Division. The purpose of the checklist is to verify that an agency procurement officer has obtained and included required documentation necessary for the Purchasing Division to process the requisition without future processing disruptions. At the agency's preference, the agency **MUST** either submit the checklist by attaching it to the requisition's Header **OR** by placing it in the requisition's Procurement Folder.

FOR ALL SOLICITATION TYPES:

#	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
1	Specifications and Pricing Page included	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Use of correct specification template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Use of correct requisition type [CRQS → CCT or CPO] or [CROM → CMA]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Use of most current terms and conditions (www.state.wv.us/admin/purchase/TCP.pdf)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Maximum budgeted amount in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Suggested vendors in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Capitol Building Commission pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Financing (Governor's Office) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Fleet Management Division pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
10	Insurance requirements				
	Commercial General Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Automobile Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Workers' Compensation/Employer's Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Cyber Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Builder's Risk/Installation Floater	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Professional Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Office of Technology CIO pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Treasurer's Office (banking) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FOR CHANGE ORDERS/RENEWALS:

1	Two-party agreement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Standard change order language	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Office of Technology CIO approval	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	Justification for price increases/backdating/other	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Bond Rider (Construction)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	Secretary of State Verification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	State debarment verification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	Federal debarment verification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**The items pre-checked are required before a Purchase Requisition may be submitted to the Purchasing Division. Failure to complete and verify this documentation may result in rejection of the requisition back to the agency. It is up to the agency procurement officer to determine if pre-approvals, insurance, or other documentation is needed for the purchase. The referenced information below may be used to make this determination.*

For Purchasing Division Use Only:

I have reviewed the requisition identified above and find that it is sufficient to advertise publicly to the vendor community. My review does not preclude the possibility that the vendor community, or some other entity, will identify an area of concern; however, should such issues or concerns arise, they will be reviewed and addressed as may be appropriate.

Signature: _____

Tara