

# THE BUYERS NETWORK

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**THE BUYERS NETWORK** is Published Monthly by the Purchasing Division of the West Virginia Department of Administration to Promote Better Value in Public Purchasing.

## Purchasing Division Publishes New Procedures Handbook to Clarify and Highlight Information

The Purchasing Division has reorganized and reworded its *Purchasing Division Procedures Handbook* to clarify and highlight important processes and procedures, while also making the information easier to digest.

As part of the changes, the appendices were reduced from 17 to seven that the Purchasing Division believes to be most important, with Frequently Used Links (Appendix A) directing users to additional resources.

"I'm most excited that the new *Handbook* incorporates 'Notes' throughout to highlight important information," said Assistant Purchasing Director Samantha Knapp. "The notes are indicated by a megaphone icon and include links to online resources, *wvOASIS* tips and tricks, and more."

The document will continue to be linked throughout, allowing individuals to jump to various sites or other parts of the document when necessary. It will still be posted online in a PDF format and is searchable by selecting "CTRL F" to find various words and phrases in the document.

The *Handbook* also includes the revised Purchasing Decision Path (Appendix B), which has been reduced to five steps from the previous 11. The information contained within the path better details the purchasing process as it relates to the methods of procurement, spending thresholds, documentation, and more.

The *Purchasing Division Procedures Handbook* can be found online at [www.state.wv.us/admin/purchase/Handbook/2021/handbook.pdf](http://www.state.wv.us/admin/purchase/Handbook/2021/handbook.pdf).



### West Virginia Purchasing Division Procedures Handbook

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The West Virginia Purchasing Division routinely reviews its *Procedures Handbook* to ensure the information is current and accurate. The staff makes updates as needed to provide clarity to previously published information.

## INSIDE...

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- Purchasing Division Seeks Award Nominations
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## Registration for Virtual Agency Purchasing Conference Opens July 12

The Purchasing Division is pleased to announce that registration for its annual Agency Purchasing Conference, being offered virtually this year from Aug. 23-27, will kick off for all attendees on July 12. Registration will be available online at [www.state.wv.us/admin/purchase/Conference/Agency/2021](http://www.state.wv.us/admin/purchase/Conference/Agency/2021), and will be limited to 100 attendees per session.

The conference will feature online workshops on privacy and cybersecurity, forms and documentation, statewide contracts, managing vendors, and more. During registration, attendees will be permitted to choose up to 10 sessions in which to participate. After all registrations are processed, any

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## Modified Resources, Processes to Serve the Greater Good for West Virginia State Purchasing

Just like January 1, the beginning of July each year feels like a fresh start, and technically, I suppose it is for state employees. Another fiscal year has ended, and a new one is underway. It's a milestone for many whose goal is to get projects awarded and budgets wrapped up. While the pressure to meet that deadline mounts, opportunity also presents itself. For the Purchasing Division, July 1 often marks the beginning of new strategies and initiatives undertaken to streamline and provide efficiency to the state purchasing process. The following are some of the initiatives we're working on this year.

This month, I'm pleased to introduce our new and improved *Purchasing Division Procedures Handbook*. The goal of the redesign was to share information in a way that users find helpful in their day-to-day jobs. While the content did not significantly change, the blueprint of the information and its detail provides a clarity of the processes and procedures often sought by procurement officers.

As part of the updates, we incorporated helpful "notes," indicated by a megaphone icon, that highlight need-to-know information. The new Handbook provides the same links and search functionality as before, making it easy to find relevant information. Our hope is that the new Handbook will serve as a valuable resource for both experienced public procurement officers and those who are either new to the public purchasing field or who don't do purchasing as a primary job function.

The modified step-by-step Purchasing Decision Path has been incorporated into the new Handbook as Appendix B. This revised path was shared as part of a survey distributed several months ago to procurement officers, and respondents overwhelmingly preferred the revised five-step process, with each step more detailed depending on the type of purchase and dollar threshold. I hope this document will serve as a useful tool in your day-to-day purchasing duties but also when onboarding other personnel within your agency. For those who prefer the traditional Purchasing Decision Path, a copy is still available upon request by emailing Assistant Director Samantha Knapp at [Samantha.S.Knapp@wv.gov](mailto:Samantha.S.Knapp@wv.gov).

As part of that survey, we also assessed how making some cooperative contracts non-mandatory would impact agencies. Most respondents shared that it would not have a significant impact. Beginning July 1, 2021, certain cooperative contracts became non-mandatory for use. We believe making these contracts non-mandatory serves the greater good: those who wish to continue using them can, and those who prefer not to use them for various reasons can follow the competitive purchasing procedures outlined in the Handbook for the spending threshold for that specific purchase.

The non-mandatory contracts are identified on the statewide contracts page with "(non-mandatory)" beside the description of the good or service. Please note that all statewide contracts competitively bid by the Purchasing Division will continue to be mandatory for state agency use, and agencies must request a waiver from the Purchasing Division to keep on file for any purchase for which they are approved to procure the good or service elsewhere.

Finally, I want to take a moment to thank the procurement officers who responded with information and pictures for our Procurement Profile publication. This publication was a large undertaking but one we think was necessary to connect with our agency partners. While we hope to pick back up with in-person offerings (i.e. trainings, conferences, open house events, etc.) soon, I hope you understand how much we value both our relationship with you and your relationships with each other. Please take a few minutes to review the Procurement Profile publication and get to know your peers and their faces.

We look forward to *hopefully* seeing you in person soon.



## WVSASP Offers Local Delivery of Warehouse Inventory

State agencies in the Charleston area are invited to take advantage of a special offer by the West Virginia State Agency for Surplus Property (WVSASP): free delivery! Items purchased from WVSASP, including desks, chairs, bookcases, and file cabinets, are now available for free local delivery.

"WVSASP is always looking for new ways to serve our state agencies," said WVSASP Manager Elizabeth Cooper. "We understand that taking time out of the daily work schedule to rent a truck and transport items is not an option for each agency. By delivering to local state agencies, we can assist with getting re-

sources where they need to be."

While delivery is free to local state agencies, WVSASP will not be able to assist with the placement of an item once it has reached its destination. All pickups and retirements must be arranged in advance and WVSASP will not remove any unapproved items at the time of delivery.

Local delivery areas include Dunbar, Charleston, and St. Albans. To see if your area is available for delivery or to arrange the purchase and delivery of an item, please call Matt Harper at 304.356.2423.

# Purchasing Division Seeks Award Nominations

The West Virginia Purchasing Division is now accepting nominations for its recognition program, *Procurement Officer of the Year* (POOY), and another award, *Excellence in Specification Writing*. Nominations for both awards should be submitted no later than July 30, 2021.

The POOY program, now in its 26<sup>th</sup> year, was implemented in 1996 to recognize the dedication and hard work of state agency procurement officers who consistently demonstrate the highest level of professionalism and performance. It allows agency purchasers to recognize their colleagues who have exhibited the highest standards in the purchasing profession and serve as leaders in the field.

Criteria that will be considered by an evaluation committee include, but are not limited to, tenure, performance, communication, professional development, and good purchasing practices.

The *Excellence in Specification Writing*

award will be presented to an agency whose procurement officer demonstrates a strong ability to write specifications that are complete, concise, and competitive. Specifications serve as the backbone for competitive purchasing by helping the agency get exactly what it needs, and also serves as the framework for vendors submitting bids. Good specifications decrease ambiguity and often result in a lower cost to the state. They also serve as the vendor's contract requirements throughout the life of the contract.

They have also been the reason behind protests, the cancellation of solicitations, re-award of contracts, and more. The significance of writing good specifications reaches far and wide, but ideally, they provide protection to the state and its taxpayer dollars by ensuring that the money is spent wisely.

The nominations submitted by agencies or individuals must include the scope

of the project and whether the specifications adequately defined it; pricing—was it competitive and did multiple vendors submit bids or could the specifications drive down pricing; administration—are the specifications something the agency and vendor can easily implement or put into action; time—did the agency provide adequate lead time for the solicitation; and appearance/readability of the specifications—their legibility, did they make sense, and were they unambiguous and non-contradictory.

Information on the criteria and nominations for both awards can be found on the Purchasing Division's website [www.state.wv.us/admin/purchase/Conference/Agency/2021](http://www.state.wv.us/admin/purchase/Conference/Agency/2021). Questions regarding these nominations may be directed to Assistant Purchasing Director Samantha Knapp at [Samantha.S.Knapp@wv.gov](mailto:Samantha.S.Knapp@wv.gov) or 304.558.7022.

## Inspection Unit Announces Grading Changes

There have been some changes recently in how Purchasing Division inspectors arrive at the overall letter grade when inspecting an agency. The weighted value of each inspection item has changed, as has the score range that determines the letter grade.

Each finding category has a point total assigned to it for deduction based on the severity of the finding, and all agencies begin with a perfect score. There are 10 finding categories used in determining a grade. Those include but are not limited to failure to bid at the central and agency levels, failure to verify compliance checks, and not utilizing statewide contracts.

"When we find a transaction that doesn't have the required documentation, we list that as a point deduction under the non-conformance rate in the 'transaction reviewed' section of the letter grade page," said Contracts Manager Greg Clay. "The points deduction is determined by the number of findings in each finding category divided by the number of transactions reviewed. For example, if a larger agency has 300 transactions reviewed and one case of stringing, the point deduction won't be as much as a smaller agency that has one case of stringing but only ten transactions reviewed."

Although each finding is very important, failure to bid at the central level (\$25,000.01 and above), commonly known as stringing, is the most severe finding. This is when the agency issues a series of requisitions, knowingly or unknowingly, that circumvents the \$25,000 threshold, which is prohibited by law. Stringing has a total deduction of up to 30 points. The next highest deduction category is failure to bid at the delegated level (\$25,000 or

A .....	90-100	D .....	60-69
B .....	80-89	F .....	<59
C .....	70-79	<i>Effective July 1, 2021</i>	

less), which is up to 20 points.

"Failure to bid at the delegated level is as important as failure to bid at the central level," Clay said. "By not utilizing the bidding process, the agency may not be receiving the best price and quality of a commodity or service, which is also prohibited by state code."

Next in the finding category is not utilizing awarded statewide contracts or failing to obtain a waiver when purchasing outside of a statewide contract from which the good or service is available, both of which are point deductions of up to 15 points. All other findings, such as failure to complete vendor registration, include a purchasing affidavit or certification of non-conflict of interest, issue a *wvOASIS* award document, etc. have a total point deduction of up to five points each.

The grading scale for letter grades is also changing. Effective July 1, 2021, agencies scoring 90-100 will be given an A; 80-89 a B; 70-79 a C; 60-69 a D; and a score below 60 will be given an F.

The state's overall letter grade average is around 88% (B).

"All designated procurement officers receive their 10 hours of required training, and most agencies do rather well in following procedures and gathering the required documentation for each purchase," Clay said.

# Two Purchasing Staff Members Receive Certifications

The Purchasing Division is pleased to announce two staff members have received the newest certification from the National Institute of Governmental Purchasing (NIGP). Assistant Purchasing Directors Samantha Knapp and Frank Whittaker received the NIGP Certified Procurement Professional (NIGP-CPP) certification in May.

The NIGP-CPP is a certification available to mid- and executive-level leaders in public procurement. Launched in 2019, the NIGP-CPP is valued by public procurement professionals, their supervisors, and employers. Its

focus areas include, but are not limited to, strategy, policy and legislation, planning and analysis, leadership, and business principles.

"I am honored to have earned this certification and for the opportunity to advance my knowledge at the leadership level," Knapp said. "I believe in our core mission and the important work that public procurement officers perform, and I'm proud of the role I play to help carry out that important work."

"True professional public procurement requires a great depth of knowledge and continuous education," Whit-

taker said. "Acquiring national certifications such as the CPP demonstrates that you have committed to that continued education and have the ability to apply it appropriately. Even though pursuing national certifications requires a significant commitment of time and effort, I would strongly encourage anyone committed to our profession to seek certifications such as the NIGP-CPP."

Information on the certification can be found at [www.nigp.org/certification/nigp-cpp](http://www.nigp.org/certification/nigp-cpp).

Congratulations to Knapp and Whittaker!

## CONFERENCE

Continued from Page 1

session with remaining vacancies will be opened for additional attendees two weeks prior to the conference. The full schedule and additional information regarding registration can be found on the registration site. A copy of the conference grid is contained below.

"While we wish that we could return to an in-person conference this year, we are happy to offer 20 virtual sessions with valuable information for agency procurement officers," said Assistant Purchasing Director Samantha Knapp. "We encourage participation in these workshops, including those on topics that aren't usually offered throughout the year. We encourage you to register as soon as registration opens for the sessions you are most interested in to make sure your spot is reserved."

The Purchasing Division last had an online conference in 2014, when procurement officers were introduced to *wvOASIS*. The Purchasing Division went to a virtual format for all of its training sessions in March 2020 because of the COVID-19 pandemic.

These sessions count toward the 10 hours of required training for designated procurement officers, as well as the training requirement for those seeking certification/recertification through the West Virginia Procurement: Basic or Advanced Certification programs. Please note that any procurement officer whose basic and/or advanced certification is expected to expire within the next year is required to attend this year's conference if that individual did not attend the Agency Purchasing Conference in 2019.

	Monday, Aug. 23	Tuesday, Aug. 24	Wed., Aug. 25	Thur., Aug. 26	Friday, Aug. 27
9:30 AM to 10:30 AM	Privacy & Cybersecurity	Payment Process	P-Card Program	WVOT Requirements	Bonds
11:00 AM to 12:00 PM	Forms & Documentation	Statewide Contracts	Developing Specifications for RFQs	Surplus Property/ Fixed Assets	Preparing RFPs
1:00 PM to 2:00 PM	<i>wvOASIS</i> : Part 1	Agency Delegated Purchasing	Vendor Registration	Managing Your Vendor	Evaluating RFPs
2:30 PM to 3:30 PM	<i>wvOASIS</i> : Part 2	SOS Requirements	Special Purchases	Inspections: Making the Grade	Correctional Industries

# Annual Inventory Certifications Due to Surplus by July 15

The deadline for state agencies to submit their annual inventory certifications to the Purchasing Division's Surplus Property Unit is fast approaching. In accordance with W. Va. Code §5A-3-35, the head of every spending unit must file an inventory of all real and personal property, equipment, supplies and commodities in its possession as of the end of the fiscal year on or before July 15 of each year. Once every three years, a physical inventory is required.

Agencies must complete the *Inventory Management Certification Cover Sheet* and submit it to the West Virginia State Agency for Surplus Property (WVSASP) no later than July 15, 2021. A copy of the Certification Cover Sheet can be found online at [www.state.wv.us/admin/purchase/surplus/forms/AssetMgmtCertificationCoverSheet.pdf](http://www.state.wv.us/admin/purchase/surplus/forms/AssetMgmtCertificationCoverSheet.pdf).

The Certification Cover Sheet should include:

- The date the last physical inventory was taken of all reportable assets under the agency head's authority;
- Certification that the agency has entered all real property and all reportable assets in its possession for the current fiscal year into the wvOASIS Fixed Assets System;
- Certification that all outdated assets under the agency head's administration were retired in conformance with WVSASP policy, procedures, and guidelines; and
- Certification that the information contained in the wvOASIS Fixed Assets System is to serve as the required inventory report that must be filed with the

Purchasing Director.

Agencies are also reminded to check for asset shell documents which should be completed, or the event type changed to "FA14," which will remove the shell document.

All agencies that are exempt from WVSASP must submit the *Vehicle Inventory Certification Cover Sheet*, as required by the W. Va. Code, 5A-12-7, to the Purchasing Division by July 15 of each year certifying the following:

- All vehicles and equipment requiring a state license plate (including vehicles with a rating of more than one ton, requiring a commercial driver's license to operate, and all-terrain vehicles) have been entered into the wvOASIS Fixed Assets System.
- All vehicles and equipment reported in the wvOASIS Fixed Assets System are accurate and current.

The *Vehicle Inventory Certification Cover Sheet* is online at [www.state.wv.us/admin/purchase/surplus/InventoryMgt/VehicleInventory\\_AssetMgmtCertificationCoverSheet.pdf](http://www.state.wv.us/admin/purchase/surplus/InventoryMgt/VehicleInventory_AssetMgmtCertificationCoverSheet.pdf).

Because the July 15 deadline is set by W. Va. Code, and operations have resumed following the COVID-19 pandemic, no extensions will be granted this year. For information regarding inventory management policies and procedures, visit [www.state.wv.us/admin/purchase/surplus/InventoryMgt](http://www.state.wv.us/admin/purchase/surplus/InventoryMgt). Additional questions regarding the reconciliation of fixed assets may be directed to Elizabeth Cooper 304.766.2626 or [Elizabeth.J.Cooper@wv.gov](mailto:Elizabeth.J.Cooper@wv.gov).

## All Submitted Award Letters and Disqualifications Require Complete and Accurate Details

The Purchasing Division would like to remind agency procurement officers of the importance of including specifics in recommendation for award letters.

When an agency makes a recommendation for award, the Purchasing Division looks for specific information. Including this information as part of the original recommendation will help expedite the process.

"If the agency is awarding a contract to the lowest bidder, we want to see the company name, a statement that they are the low bid and that they meet all mandatory specifications, as well as the appropriate signatures," said Buyer Supervisor Tara Lyle.

The Purchasing Division requires additional information if the low bid is disqualified, however. The name of the second lowest bidder needs to be provided, along with a statement that the second lowest bidder meets all the mandatory specifications, as well as detailed information as to why the lowest bid was not accepted.

"You have to treat the award recommendation letter like anyone could walk off the street and open the contract file and know exactly why you awarded to the vendor you did," Lyle said.

It's all about transparency and complete and accurate records, she continued. Questions regarding recommendation letters can be directed to your agency's designated procurement officer or assigned Purchasing Division buyer.

### THE BUYERS NETWORK

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# Current Statewide Contract Update

(As of June 11, 2021)

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.

## Contract Renewals

Contract	Vendor	Commodity	Effective Date
CRENTAL20B	Hertz Corporation	Vehicle leasing	05/21/21 -05/33/25
EPORTAL16	WV Interactive	Website design services	07/01/21 -06/30/22

PESTCTR18A	Exterm Tek Pest Control	Pest control	07/15/21 -07/14/22
PESTCTR18B	Exterm Tek Pest Control	Pest control	07/15/21 -07/14/22
SWC*02	Verizon Business	Telecomm Services	07/01/21 -06/30/22

## Miscellaneous Actions

Contract	Vendor	Commodity	Description of Change
IP19 Equipment	Dell Marketing	Computer	To replace the end-of-life machines

## WVSASP Says “Thank You” During Customer Appreciation Event

Last month, the West Virginia State Agency for Surplus Property (WVSASP) hosted a Customer Appreciation Day event. This event allowed WVSASP staff to celebrate their customers with light refreshments and extended hours.

“We are so thankful for our customers and were pleased to host a small event showing our appreciation,” said WVSASP Manager Elizabeth Cooper. “WVSASP also welcomed several first-time visitors to the warehouse.”

More than 25 individuals attended the reception on June 24, 2021, and shopped for items such as furniture, electronics, and vehicles. The extended hours were a popular incentive to visit for many individuals.

State employees, except for Purchasing Division employees, may acquire property from WVSASP for personal use as long as they purchase as a member of the public. To learn more, visit [WVSurplus.gov](http://WVSurplus.gov) or call 304.766.2626. WVSASP also maintains a Facebook page at [www.facebook.com/wvsurplus](http://www.facebook.com/wvsurplus) with information regarding weekly deals, the vehicle list, and unique inventory.



## FOR MORE INFORMATION

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

BUYER	E-MAIL	PHONE
<u>Supervisors</u>		
Tara Lyle	Tara.L.Lyle@wv.gov	558-2544
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<u>Senior Buyers</u>		
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David Pauline	David.H.Pauline@wv.gov	558-0067
<u>Buyers</u>		
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Dusty Smith	Dusty.J.Smith@wv.gov	558-2063
Toby Welch	Toby.L.Welch@wv.gov	558-8802

Buyers Network