

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.

Statewide Contracts Benefit State Agencies, Companies

A statewide contract has benefits for both the state and the company selected to provide goods and services. The state gets what it needs at the lowest cost and the company grows as it meets those needs.

Fastenal is one such company. The company first got a statewide contract to provide maintenance, repair, and operations (MRO) in 2018. The year before that, the company had just 17 branch locations in West Virginia. To meet the increased business of a statewide contract, the company expanded to 22 locations by 2022.

In addition, company reports show its total economic impact to the state in 2017 was \$4.9 million. By 2022, that number had increased to \$7.3 million.

“Fastenal has been able to grow our economic impact in West Virginia since being awarded the statewide contract,” said Ken Lyons, government sales manager for Fastenal. “We support the local manufacturing base by purchasing directly from 40 small business suppliers and 166 large business suppliers.”

The company grew from 81 employees in 2017 to 101 in 2022, and went from having 21 small business suppliers in 2017 to 40 in 2022. It also now has 166 large business suppliers, when it didn't



have any in 2022.

The most common items Fastenal provides to state agencies include safety supplies and facility maintenance supplies, as well as trash can liners and material handling products.

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Annual Purchasing Conference is Just Around the Corner

The 2023 Agency Purchasing Conference is just a few weeks away and there are some reminders the Purchasing Division would like to convey as the conference approaches.

The conference will be Oct. 17-20, 2023, at Oglebay Resort in Wheeling. This year's agenda features five concurrent in-person workshops and a concurrent webinar for virtual attendees, with new workshop topics; a beginner's track with seven workshops perfect for individuals new to the state purchasing process or those who simply need a refresher but are not sure what classes to take; group meals with plenty of opportunities for networking; and special recognition of the 2023 *Procurement Officer of the Year* award recipient.

The Purchasing Division will again utilize the Grupio app to share information. This is the same app that was used at the conference in 2022. Attendees are encouraged to download it prior to attending, but

Please see **CONFERENCE REMINDERS**, page 3

Purchasing Division Says Goodbye to Longtime Director, Gears Up for Annual Conference

The only thing that stays constant is change. Change is necessary to grow personally and professionally. After many years of service to the West Virginia Purchasing Division, former Director Mike Sheets has moved on to seek new challenges and to dedicate time and commitment to his passion of software engineering. He has been an integral part of our team, and while we are sad to see him go, we are happy to see him thrive.

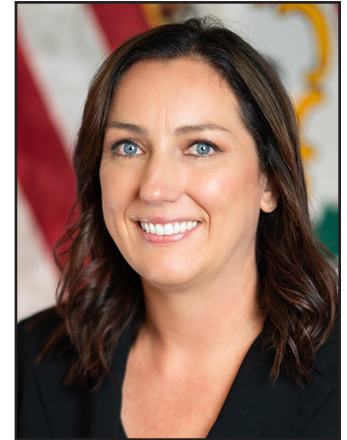
Mike has been a driving force behind our organization's success for the past six years as director, and for many years before that in various positions within the Division. Under his leadership, the Division worked with Toyota to make various improvements to the process, many of which will live on in our daily work. His dedication to a culture of collaboration and continuous improvement will have a lasting effect on all of us, and we wish him well during this next chapter of his career and life.

As we adjust to this change, business must go on. This month, we will welcome nearly 200 procurement officers in person to the 2023 Agency Purchasing Conference.

Here are a few things to remember:

- Upon arrival at Oglebay Resort, you can check into the conference at our onsite registration in the Glessner Lobby from 3 p.m. to 6 p.m. on Tuesday, Oct. 17, 2023, and from 7:30 a.m. to 9:15 a.m. on Wednesday, Oct. 18, 2023.
- We will have a welcome reception upstairs in the Fort Henry Room and Hickman Lounge with light refreshments and drinks on Tuesday evening from 6 p.m. to 7 p.m.
- Join us for a networking breakfast on Wednesday, Oct. 18, 2023, from 7:30 a.m. to 9:00 a.m.
- Commencement will get underway promptly at 9:15 a.m.
- Dress attire for the conference is casual. While blue jeans are acceptable, jeans with holes are not. Please wear a business casual shirt.

- Dress in layers, if possible. Rooms tend to change from hot to cold. Having layers to add or remove will ensure you remain comfortable throughout the day.
- We will once again be using the Grupio app to share information during the conference. Information on how to access this app will be emailed to participants prior to the conference.



- Dinners on Wednesday, Oct. 18, 2023, and Thursday, Oct. 19, 2023, will be on your own, as well as breakfast on Friday, Oct. 20. All other meals will be provided. Please plan accordingly.
- If you have any dietary restrictions, please let Courtney Johnson know at Courtney.S.Johnson@wv.gov.

In addition to these updates for in-person attendees, more pre-conference reminders will be emailed prior to the conference. Should you have any questions, email Purchasing.Training@wv.gov. You can also see the article on page 1 for more information.

While we hope you will be joining us at the 2023 Agency Purchasing Conference, there are other ways to connect in the coming months. Our next quarterly call is scheduled for Tuesday, Nov. 14, 2023, and there are two hybrid training opportunities after the conference as we wrap up 2023. Whether it is in person or online, we always look forward to connecting with our procurement peers and remain just an email away at Purchasing.Help@wv.gov.

Travelers Reminded of the State Travel Rules

State employees traveling for work are reminded of the State Travel Rules, which say that travelers must use state-wide contracts for travel services, or deal directly with the service vendor. Third-party booking sites may not be used.

There are two travel statewide contracts available for use. They include AIRFARE21 for discounted flights through Delta Airlines, and TRAVEL21, held by National Travel, which includes travel services for booking air and ground transportation at the lowest fare possible that meets the traveler's needs for the mode of travel preferred, hotel and motel rooms or other accommodations, and any in-city ground transportation.

Please note, according to the ordering instructions for

AIRFARE21, individuals looking to receive discounted pricing on Delta flights must reserve their flights through National Travel by calling 304-357-0801 and requesting to speak with a "state" agent. This same number can be used for questions related to the TRAVEL21 contract for all other booking options.

Should you have questions regarding these contracts, please contact Jill Robinson at National Travel at 304-357-0830.

If traveling in-state and airfare is not required, you can use the Vehicle Rental versus Reimbursement Calculator to determine the most cost efficient mode of transportation.

Procurement Officer Profile: Kristy James Keeps Procurements Moving at Highways

The West Virginia Department of Transportation (WVDOT), comprised of more than 4,000 men and women, includes but is not limited to the Division of Highways; Division of Motor Vehicles; the Division of Multimodal Transportation Facilities; and the Parkways, Economic Development and Tourism Authority (WV Turnpike). Of those thousands of employees, there's one who manages all the procurements: Kristy James.

A native and current resident of St. Albans, James has a bachelor's degree in political science with a minor in history and an MBA from Marshall University.

She started working for the state in January 1993 as a Judith A. Herdon Intern during her senior year in college. When the internship ended, she was hired full-time in the Cabinet Secretary's Office for the Department of Administration. Since then, she has worked in several agencies including the West Virginia Lottery,

former IS&C (Information Services & Communications), Purchasing Division, and Division of Highways. Most of her service has been with Highways, beginning in the IT Department. She started in an IT support role that later evolved into drafting technical specifications for large IT projects for the Division of Motor Vehicles and Highways. She moved from IT procurement into serving as the DOT's Procurement Officer in the Budget and Procurement Division, where she has spent the last six years managing all procurements for the DOT.

"I enjoy the fact that I get to work with so many people in my department," she said. "It's rewarding to help our divisions and districts get the goods and services that are needed to complete the department's mission, which is to responsibly provide a safe, efficient and reliable transportation system that supports economic opportunity and quality of life."



Kristy James, WVDOT

James is married and has an adult son, along with two fur babies, a corgi and a husky. In her spare time, she enjoys machine embroidery, sewing, and quilting. She also loves watching movies and reading.

CONFERENCE REMINDERS

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it is not required to be used. All information found in the app is also available online.

Room check-in begins at 4 p.m. You may get a room sooner only if the room is clean and ready to be occupied. Please stop by the conference registration desk in the Glessner Lobby between 3 p.m. and 6 p.m. on Tuesday, Oct. 17, 2023, to sign in and receive your conference packet. In your packet, you'll find a variety of items, including your name badge, a personalized schedule of classes for which you registered, a copy of the conference grid, and a list of conference attendees. If you won't make it in time to check in at the conference registration desk on Tuesday, registration will open again on Wednesday at 7:30 a.m. in the Glessner Lobby.

An evening social will be held in the Fort Henry Room and Hickman Lounge from 6 p.m. to 7 p.m. on Tuesday, Oct. 17, 2023. Light refreshments and beverages will be provided.

If you wish to print the PowerPoint presentations, you can find copies online at www.state.wv.us/admin/purchase/Conference/Agency/2023. Copies of the presentations may also be viewed within the Grupio app. PowerPoint presentations will be posted online in the coming days and all are expected to be online by Friday, Oct. 6, 2023.

The dress attire is casual and jeans without holes are acceptable. Attendees will have free time following their full day of conference workshops, so you may wish to bring some Buyers Network

comfortable clothes to change into later. Comfort levels for classroom temperatures may vary for some participants, so you may also wish to bring a light jacket as a precaution or dress in layers.

Breakfast and lunch will be provided on Wednesday and Thursday in the Glessner Auditorium. Dinner each night is on your own for a chance to explore the Wheeling area. Breakfast on Friday morning will also be on your own.

Additionally, the 2023 *Agency Procurement Officer of the Year* will be announced during the Thursday luncheon.

If you have any questions between now and the time of conference, contact Courtney Johnson at 304-558-4213. The Purchasing Division staff looks forward to welcoming you this month at the 2023 Agency Purchasing Conference!



Purchasing Division Shares New Prequalification Agreement Request Template Available for Use

As part of its initiative to standardize processes and offer helpful tools to assist agency procurement officers in the public procurement process, the Purchasing Division is pleased to introduce its new *Prequalification Agreement Request* (WV-41) template. Under certain circumstances, state agencies are permitted to establish a list of prequalified vendors, in accordance with W. Va. Code § 5A-3-10e(b) (4), from which they can subsequently obtain bids through a delegated process for commodities and services covered by the prequalification agreement.

Prequalification agreements should be limited to commodities and services for which the market is volatile. While using the prequalification process is sometimes appropriate to best meet the needs of an agency, it should be noted that this process requires additional work on the part of the agency as needs arise.

As part of its request to use the prequalification process, agency procurement officers must:

- Provide a detailed description of the commodity or service to be covered by the prequalification agreement.

- Identify one or more requirements that each vendor must meet to be approved for the prequalification agreement. This may include experience, quality assurance, licensing, and delivery terms.
- Provide an estimation of the quantity and price of the commodity or service to be purchased over the term of the contracts.
- Include any forms that will be used in the delegated prequalification bidding, such as pricing sheets.

A copy of the *Prequalification Agreement Request* form can be found online on the Purchasing Division's Forms webpage under "Alternative Purchasing Methods" at www.state.wv.us/admin/purchase/forms.html. To directly access the *Prequalification Agreement Request* form, visit [www.state.wv.us/admin/purchase/Documents/PrequalificationAgreementRequest\(WV-41\).pdf](http://www.state.wv.us/admin/purchase/Documents/PrequalificationAgreementRequest(WV-41).pdf).

For more information on the prequalification agreement and delegated prequalification bidding process, see Section 7.16 of the *Purchasing Division Procedures Handbook*.

CENTRAL REQUISITION REJECTIONS RECAP AUG. 18-SEPT. 22, 2023

| | |
|------------------------|----------|
| Requisitions Received: | 157 |
| <i>Last Month:</i> | 142 |
| Requisitions Rejected: | 46 (29%) |
| <i>Last Month:</i> | 55 (39%) |
| Reasons for Rejection: | 63 |
| <i>Last Month:</i> | 71 |

Reasons for Requisition Rejections

| | |
|--------------------------------|----|
| No Checklist | 10 |
| Vendor Issues | 0 |
| Financial | 4 |
| Language or Document Issues | 17 |
| Ts and Cs/Specification Issues | 7 |
| Miscellaneous | 8 |

Specific examples for rejections:

- Added services by change order not in the original scope/contract
- WVOT approval missing
- Incorrect renewal letter attached

Purchasing Division Recognizes Latest Certification Recipient

The Purchasing Division is pleased to recognize Stephanie Pettry as the latest recipient in its West Virginia Procurement: Basic Certification program.

Pettry, a procurement specialist for DHHR's Office of Management Information Services, has worked for the state for more than three years.

"I have come a long way in three years. I became involved in procurement during the COVID-19 pandemic and learned mostly from home. Studying the Purchasing Handbook is the key to learning," said Pettry.

"I love working with my procurement team and supervisor. You have to enjoy your job in order to be successful at what you do!"

State agency procurement officers interested in participating in the basic and/or advanced certification programs may review the requirements at www.state.wv.us/admin/purchase/training/Certification. Questions regarding the programs may be directed to Courtney Johnson at Courtney.S.Johnson@wv.gov or 304-558-4213.



The upcoming 2023 Agency Purchasing Conference is a great way to complete many of the required courses and to connect with peers who have completed the Basic or Advanced certification programs. A list of all certification recipients is available on the above website and within the Grupio app.

New Rule Gives Agencies Ability to Process Emergency Contracts Regardless of Cost

A new purchasing rule this year gives agencies more autonomy when it comes to emergency purchases. Agencies are now authorized to award their own contracts within wvOASIS for emergency procurements exceeding their delegated threshold, pending Purchasing Division approval.

"When an emergency occurs during normal business hours and is expected to exceed the agency's delegated threshold, the process remains the same as before. The agency should obtain written approval from the Purchasing Director or his/her designee, seek bids, and authorize the work," said Assistant Purchasing Director Frank Whittaker. "Similarly, for emergencies that occur outside of normal business hours that require immediate action, the agency can proceed with the emergency purchase with proper justification and documentation. The difference comes with finalizing the contract in wvOASIS."

Agencies now have the authority to process emergency contracts as agency contracts, even when they exceed the agency's delegated threshold. Upon awarding emergency contracts in wvOASIS, they are still required to be publicly posted. The agency must report the emergency purchase to the Purchasing Division within 30 days, along with a copy of the emergency purchase

request and approval by the Purchasing Division, documentation of what was purchased, the purchase price, and any executed contract documents.

For agency delegated emergency procurements, the same rules as before also apply. However, similar to central emergency procurements, the agency is now required to report all emergency purchases made at the delegated level (between \$5,000.01 and the agency's delegated threshold) to the Purchasing Division within 30 days of the emergency for public posting.

Please keep in mind that emergency purchases cannot be used for hardship resulting from neglect, poor planning, or lack of organization by the spending unit.

"It is important for agencies to use sound judgment when declaring emergencies," said Whittaker. "We want to remain as transparent as possible and continue to be good stewards of the taxpayers' dollars."

To view emergency procurements processed by agencies under their delegated authority and all non-delegated emergency procurement requests, approvals, and follow-up documents, visit www.state.wv.us/admin/purchase/emergencyrequests.html.

STATEWIDE CONTRACTS

Continued from Page 1

State agencies can procure from a statewide contract with confidence that the awarded vendor has met all the required compliance checks such as registration fees, Secretary of State, tax, workers' compensation, federal/state debarment, unemployment insurance, and proper liability insurances. Additionally, when taking into account the item cost, agency search and travel time, free shipping provided on most contracts, etc., a company chosen for a statewide contract has shown to offer the best value while streamlining the procurement process.

Weekly Tip Recaps: *Click to View the Tip Email*

| Date | Tip |
|----------|---|
| Sept. 13 | Procurement officers can use the Business Intelligence report, WV-FIN-PROC-042, within wvOASIS to identify contracts getting ready to expire for their agency. Tracking contracts allows agency procurement officers ample time to determine next steps, such as renewing the contract or rebidding it, when necessary. |
| Sept. 19 | Include the Certification of Non-Conflict of Interest, signed by the agency procurement officer and other evaluators and advisors, with all transactions exceeding \$5,000. |
| Sept. 28 | Use and customize checklists to ensure consistency and completeness in carrying out your agency's procurement transactions. |

THE BUYERS NETWORK

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

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Current Statewide Contract Update

(As of Sept. 18, 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.

Contracts Renewals

| Contract | Vendor | Commodity | Effective Date |
|----------------|-------------------------------|------------------------------|-----------------------|
| AIRFARE21 | Delta Airfare | Airfare | 10/01/23 -09/30/24 |
| ESRI21 | Environmental Systems | Geographic Info System | 08/15/23 -08/19/24 |
| LAR20 | SHI | Software International | 07/31/23 -10/31/23 |
| LDPHON -E22 | Touchtone Comms. | Long-Distance Telephone Svcs | 08/17/23 -08/16/24 |
| WVRFJAN23 | WV Assoc. of Rehab Facilities | Janitorial Svcs | 10/01/23 -09/30/24 |

Miscellaneous Updates

| Contract | Vendor | Commodity | Description of Change |
|-----------------|-------------------------------|-----------------|--------------------------|
| CRENTAL -20A | Enterprise | Vehicle Leasing | To update vendor pricing |
| WVRFJAN23 | WV Assoc. of Rehab Facilities | Janitorial Svcs | To add pricing pages |

Expiring Statewide Contracts Tracking

(As of Sept. 18, 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

NTIRE21

TO BE DETERMINED

AED22C
LAR20

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

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 |

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