
2015 Agency Purchasing Conference

WORKSHOP SYNOPSES



Advanced Track

This group of classes is designed for primary agency-designated procurement officers and their backup designees only. Offered on the first day of class, this track is geared toward agency-procurement officers whose primary job is purchasing at a higher level.

Classes include:

Contract Drafting

Attendees in this class can expect to learn the core principles of contract drafting, along with some of the finer points of drafting that could elevate a document from being barely recognizable, to the go-to form for all of an agency's contracting needs. More specifically, attendees will learn the importance of key contract components, consistency in wording, clarification of meaning, avoidance of ambiguity, legal rules of contract interpretation, and the impact of drafting principles on the agency's current and future procurement contracts.

Preparing a Request for Proposals

In this class, participants will learn the basic guidelines for preparing an RFP, from the initial approval of the Purchasing Division to developing the agency's goals and objectives, writing the specifications, and completing the RFP template.

Law/Rule Review

A lot has changed in the past two years. In this workshop, participants will take an in-depth look at recent changes to procurement law and rules and discuss the implications of those changes on day-to-day procurement activities.

Roundtable Discussions

This session will allow primary agency-procurement officers and their backups the opportunity to discuss multiple complex purchasing-related issues and brainstorm solutions and improvements.

Agency-Delegated Purchasing

This course will address agency-purchasing procedures for commodities and services expected to cost \$25,000.00 or less and help participants identify bidding levels within this authority. A panel of three agency representatives will assist the presenter in answering questions related to this dollar threshold.

Basic Solicitation Types

In this session, participants will learn the different solicitation types utilized in the state-purchasing process. An in-depth review of the wvOASIS documents, workflow, and approvals for each type, from the requisition to the award of a purchase order/contract, will be discussed.

Beginner's Track

This group of classes, designed for state employees with two years or less experience in procurement, will cover six different topics. Offered consecutively on the first and second days of class, you will learn the fundamentals needed to help you become a seasoned procurement professional.

Classes include:

Public Procurement Basics

This session will cover the fundamentals of the procurement process. A basic overview of the Purchasing Division, including who is required to buy under its authority and how the division is structured organizationally, will be discussed. Attendees will also review the steps of the Purchasing Decision Path, as well as some terminology used in the state-purchasing process.

Vendor Registration Procedures

This workshop will discuss the vendor-registration process, rules, and requirements, including who is required to register as a vendor and when the annual registration fee is applicable. In addition, we will cover the various methods at our disposal for completing a successful registration and when each tool is used, as well as the responsibilities of both the state agency and the Purchasing Division in the vendor-registration process.

Developing Specifications

This workshop will provide guidelines for writing effective specifications. Some issues addressed will include when to use mandatory specifications, specifications for request for quotations versus request for proposals, and the "or equal" requirement when using brand names.

Basic Solicitation Types

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Evaluation to Post Award

This workshop will discuss the process of examining all received bid responses to determine the bidder's adherence to the mandatory specifications, compliance with procurement regulations, and determination of the lowest responsible and responsive bidder in order to facilitate award.

Test Your Knowledge / Q&A Session

Participants will end this six-session track with an engaging activity to test their knowledge. Additionally, subject-matter experts will be on hand to answer any lingering questions that attendees may have.

Change Orders and Addenda

This workshop will provide an overview of change orders and addenda and will address the types of changes involved for each. General instructions on preparing, processing, and issuing change orders and addenda will be offered.

Non-Competitive Purchases from CRPs

This workshop will address the role of the Governor's Committee for the Purchase of Commodities and Services from the Handicapped. The Committee administers the prices set for non-competitive purchases made pursuant to **West Virginia Code §5A-3-10**, which relates to the purchase of products from non-profit workshops. Examples of commodities and services available through these Community Rehabilitation Programs (CRPs) include janitorial services, bottled water, data management, wiping cloths, liquid hand soap, and oil-absorbency kits.

Contract Drafting

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Correctional Industries

Back by popular demand, West Virginia Correctional Industries (WVCI) will show a 20- to 25-minute video of its shops in action! Following the video, WVCI will answer questions about the agency and how it operates, how to navigate its website, and if time

permits, present new products. Individuals from the shops will be in attendance to answer any questions that conference attendees may have.

Developing Specifications

This workshop will provide guidelines for writing effective specifications. Some issues addressed will include when to use mandatory specifications, specifications for request for quotations versus request for proposals, and the "or equal" requirement when using brand names.

Evaluating a Request for Proposal

This workshop will highlight the RFP evaluation process from scoring the technical proposal to the cost bid opening. Individuals chosen to participate in an RFP evaluation committee are required to take this training within one year of sitting on that committee.

Evaluation to Post-Award

This workshop will discuss the process of examining all received bid responses to determine the bidder's adherence to the mandatory specifications, compliance with procurement regulations, and determination of the lowest responsible and responsive bidder in order to facilitate award.

Expressions of Interest

This class will discuss this best-value procurement tool, which is primarily used in the selection of architects and engineers as specified in **West Virginia Code §5G**. The EOI process permits the state to award a contract to the most qualified vendor on the basis of demonstrated competence and qualification for the type of professional services required at a fee determined to be fair and reasonable.

Pre-Bid Conferences

This workshop will discuss pre-bid conferences, which are conducted by the state agencies, with potential bidders present. Requirements for solicitations for complex, high-dollar projects are addressed.

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Public Procurement Basics

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the steps of the Purchasing Decision Path, as well as some terminology used in the state-purchasing process.

Purchasing Card Program

This workshop will provide information on the Purchasing Card Program and its application within wvOASIS, administered by the State Auditor's Office.

Purchasing Inspections

This workshop will discuss the purpose of reviewing and auditing spending unit requests, purchases, and other transactions and purchases within the Purchasing Division's authority. It will also detail inspection procedures and requirements for state agencies.

Special Purchasing Processes

In this workshop, attendees will learn the different types of special purchases that exist in the state-purchasing process, including those made in the event of an emergency, sole-source purchases, piggybacking contracts, and exempt purchases. An overview of the circumstances and procedures for each will be discussed.

Statewide Contracts

This workshop will provide an overview of statewide contracts that are available to state agencies. Participants will learn the proper use of these contracts as well as vendor issues related to such contracts.

Surplus Property / Fixed Assets

This workshop will focus on how to obtain property through the state and federal Surplus Property programs. The discussion will include eligibility requirements of the two programs, use/compliance requirements, and property availability. In addition, you will learn the basic requirements of maintaining an agency inventory in the Fixed Assets Module. Adding property, retiring property, asset modifications, and annual certifications will be covered.

Travel Management

This workshop will discuss the state travel program and the various travel-related statewide contracts, as well as provide an overview of the functionality of the new E-Travel Management System, and discuss agency implementation timelines.

Vendor Creation and Maintenance

This workshop will provide an overview of the electronic vendor/customer registration process and the creation and requirements of the associated documents within wvOASIS. In addition, wvOASIS's relationship with Vendor Self-Service will be

examined, as well as the vendor/customer data table utilized by the vendor registration process.

Vendor Registration Procedures

This workshop will discuss the vendor-registration process, rules, and requirements, including who is required to register as a vendor and when the annual registration fee is applicable. In addition, we will cover the various methods at our disposal for completing a successful registration and when each tool is used, as well as the responsibilities of both the state agency and the Purchasing Division in the vendor-registration process.

Vendor Remedies: Protests, Circuit Court, and Court of Claims

This workshop will provide an in-depth look at the legal challenges to Purchasing Division procurements and the internal processes utilized to handle them. Attendees will be exposed to the formal protest process, circuit court suits, and court of claims actions and will discuss how the Purchasing Division and the state agency can work together to reduce the occurrence of these formal legal challenges.

vvOASIS Procurement

This workshop will include a quick overview and project status update, followed by a more in-depth discussion of how things like commodity codes, e-catalogs, electronic bidding, and encumbrance work in the system.