



2016 State Agency
Purchasing Conference
Canaan Valley Resort
August 23-26

Workshop Synopses

Advanced Track

This group of classes is designed for experienced primary and back-up agency designated procurement officers **only**. Offered on the first day of conference, this track is geared toward agency procurement officers whose primary job is purchasing at a higher level.

Classes include:

Contracting

Attendees in this class will 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.

Specification Drafting for the Seasoned Professional

This advanced workshop will provide an opportunity for attendees to develop an in-depth understanding of the importance of writing successful and effective specifications. By the end of this session, the agency purchasing professional will better understand the thought process of the Purchasing Division Buyer when reviewing specifications submitted by the agency.

Purchasing Ethics

Attendees in this class will review and discuss some of the most common ethical prohibitions and pitfalls that arise in government procurement. Furthermore, attendees will be exposed to criminal penalties related to procurement, general ethics laws of the State of West Virginia, and other various factual scenarios for discussion.

Roundtable Discussions

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

Beginner's Track

This group of classes, designed for state employees with two years or less experience in procurement, will cover seven 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.

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.

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.

Request for Quotations

This workshop will discuss the acquisition planning steps required prior to the actual bidding process, including determining the need, conducting market research, identifying possible vendors, and more. Participants will review the purchasing decision path leading up to the decision to use the Request for Quotations (RFQ) procurement method and analyze the agency and vendor's responsibilities prior to and during the advertisement of the RFQ in the Purchasing Bulletin.

Evaluation to 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.

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.

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.

Certification Study Group

In this session, participants will learn the requirements of the West Virginia Procurement: Basic and Advanced Certification programs, as well as discuss the final examination format and re-certification requirements. This session will also allow agency purchasers who are interested in obtaining either certification the opportunity to review the state purchasing processes and procedures contained in the Purchasing Division Procedures Handbook. Copies of the Handbook will be available for reference. Participants will be divided into small groups and assigned a section of the Handbook. Following their review, each group will report back to the class the key highlights from their section.

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.

Construction Purchases

This workshop will take attendees through the process of completing a construction purchase, from market research and information gathering to the final signature and encumbrance processes. As part of this review, participants will learn which documents are required in a construction purchase as well as the differences that set this type of purchase apart from other purchasing methods utilized by the Purchasing Division.

Contracting

Attendees in this class will 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.

Correctional Industries

TBD

Developing Specifications

This workshop will provide guidelines for writing effective specifications. Some issues addressed during this class 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 Proposals

This workshop will highlight the Request for Proposals (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 serving on that committee.

Evaluation to 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 Expressions of Interest (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.

Preparing a Request for Proposals

In this class, participants will learn the basic guidelines for preparing a Request for Proposals (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.

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 organizationally structured, 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.

Purchasing Card Program

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

Purchasing Ethics

Attendees in this class will review and discuss some of the most common ethical prohibitions and pitfalls that arise in government procurement. More specifically, attendees will be exposed to criminal penalties related to procurement, general ethics laws of the State of West Virginia, and various factual scenarios for discussion.

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Sheltered Workshops

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.

Special Purchases

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.

Technical Purchases

In this session, we will discuss some of the types of technical purchases most commonly made in state government. Participants will learn the most important aspects of writing technical specifications and how they impact solicitation responses. Additionally, participants will examine the technical evaluation and award processes for technical purchases.

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 through *wv*OASIS, 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 *wv*OASIS. In addition, *wv*OASIS'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.

wvOASIS Procurement

This workshop will include an overview of wvOASIS procurement functions, as well as a discussion of topics ranging from encumbrance to the Vendor Self-Service (VSS) vendor portal.