



## Workshop Synopses

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### Advanced Track

This group of classes is designed for experienced primary and backup 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:

#### *Risks in Public Procurement*

Risk, it's all around us... even in our contracts. Everything from the drafting of the contract to the actual performance risk should be considered. Attend this class and learn what to do about it.

#### *Fishbowl Purchasing Forum*

In this session, three participants will be seated at the front of the class, with one additional seat remaining empty. All attendees will write down a question on a blank sheet of paper, crumble the paper, and throw it to the front of the room. The facilitator will randomly select one of the questions to kick off the fishbowl forum. The participants at the front of the room will discuss the topic and his or her experience related to it. Any other individual in the session who would like to participate in the discussion will be required to take the empty seat at the front of the room, and each time a new person takes a seat, one other person will return to the audience. This format will allow for a constructive dialogue of purchasing-related topics pertinent to the audience.

#### *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.

### Transparency and Resources

Transparency is an often-used word in state government, and this session will explore the specific reports and resources that comprise the Purchasing Division's transparency initiatives for agencies, vendors, and citizens. We will explore our regularly-updated tools and how they empower procurement officers to better navigate the day-to-day purchasing process at their own agencies.

### 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*

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, with a focus on the use of its grading system and corrective action plan, in addition to the requirements for state agencies and contract management procedures.

### **Business Intelligence**

This workshop will provide an overview on Business Intelligence security, as well as how to navigate the Business Intelligence repository, prepare reports and work with report data in Interactive mode. Specifically, agencies will learn more about procurement-related reports found in Business Intelligence.

### **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.

### **Construction Purchases**

This workshop will take attendees through the process of completing a construction purchase. 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.

### **Correctional Industries**

This session will provide a comprehensive overview of West Virginia Correctional Industries (WVCI), including how to purchase products from WVCI, how to effectively use the WVCI website, products and services that are available to state agencies from WVCI, delivery and billing procedures, and how to obtain a waiver when WVCI doesn't have exactly what an agency needs.

### **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.

### **Electronic Business with West Virginia**

This workshop will explore state government electronic business options, resources to help purchasers expand their agencies' vendor base and tools for the procurement officer drawn from lessons learned and the latest strategies within state procurement.

### **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.

### **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.

### **How to Avoid Common Pitfalls in Public Procurement**

Navigating the West Virginia state procurement laws and rules can be tricky, but there are some tips and tricks agency procurement officers can use to ensure efficiency and effectiveness in the process. This workshop will identify the top ten common pitfalls in the public procurement process as seen by the West Virginia Purchasing Division and offer guidance on how agencies can better manage their solicitations from beginning to end while ensuring compliance with the laws, rules and procedures.

### **Inspection Services**

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, with a focus on the use of its grading system and corrective action plan, in addition to the requirements for state agencies and contract management procedures.

### **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.

### **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.

### **Purchasing as a Privacy Power House**

This session will introduce participants to the State Privacy Office and explain its role in state government, as well as the role of our state procurement officers as gatekeepers through use of the Business Associate Addendum. Attendees will learn about HIPAA and the HITECH Act, specifically about the importance of ensuring that vendors protect the health information of our State's patients and members. Finally, attendees will gain a better understanding of the risks that vendors pose to our information and how we can manage and reduce that risk through our purchasing processes and contracts.

### **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.

### **Risks in Public Procurement**

Risk, it's all around us... even in our contracts. Everything from the drafting of the contract to the actual performance risk should be considered. Attend this class and learn what to do about it.

### **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 Registration**

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.

### **WV OASIS Procurement**

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