



Workshop Synopses

Advanced Track

This group of classes is **open to 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:

Procurement Theory

As part of the Advanced Track, the Procurement Theory workshop will be an interactive session discussing in greater detail various aspects of procurement practices and the foundation from which they were created. Participants will be encouraged to provide insight from their own perspectives on various topics.

Legislative Reform

The Legislative Reform workshop will provide an in-depth review of the legislative changes resulting from the passage of Senate Bill 283. Explanation and examples of these changes will be addressed as well as the impact these changes will have on state agency procurement officers.

Roundtable Discussions

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

Agency Delegated Purchasing

This course will address agency-delegated 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 agency representatives will assist the presenter in answering questions related to this dollar threshold.

Beginner's Track

This group of classes, designed for state employees with two years or less experience in procurement or those individuals who simply need a refresher, will cover eight 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

This workshop will discuss the vendor registration program and its requirements, including at what time during your agency's transaction a vendor must register 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. We will also discuss strategies for navigating through records in the *wv*OASIS vendor/customer table.

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, discuss the benefits of using the statewide contracts, as well as vendor issues related to such contracts.

Developing Specifications for RFQs

This workshop will provide guidelines for writing effective specifications. Some topics addressed will include when to use mandatory specifications, the new standardization process for commodities, and the "or equal" requirement when using brand names when a standardization has not been approved.

Requests 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.

Transparency and Reporting

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.

Inspections: Making the Grade

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 request, in addition to the requirements for state agencies and contract management procedures.

Boards and Commissions

This interactive workshop will focus on procurement officers working specifically for boards and commissions. Since these entities may be structured slightly different than a larger agency, attendees will be asked to participate in an interactive discussion on issues faced by these entities and solutions to these problems. Attendees will also be asked to elaborate on the processes utilized within their specific board or commission.

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 recertification 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 and delivery and billing procedures. Also, there will be some special points on WVCI's clothing and embroidery products.

Developing Specifications for RFQs

This workshop will provide guidelines for writing effective specifications. Some topics addressed will include when to use mandatory specifications, the new standardization process for commodities, and the "or equal" requirement when using brand names when a standardization has not been approved.

Electronic Business with West Virginia

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

Evaluating a Request for Proposals: Part II

This workshop will highlight the Request for Proposals evaluation process from scoring the technical proposal to the cost bid opening.

Expressions of Interest

This class will highlight this best value procurement tool, which is primarily used in the selection of architects and engineers as specified in W. Va. Code 5G. The Expressions of Interest 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.

Forms and Documentation

In this session, we will discuss the following forms and when they are used: Agreement Addenda (WV-96/WV-96A); Purchasing Affidavit; Drug Free Workplace Affidavit and Cover Sheet; and more.

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.

Insurance and Bonds

This session will address the proper inclusion of insurance and bonds into the Purchasing process. We will discuss the basics of insurance and what types of coverage you should require

from those vendors who wish to do business with us. We will also discuss the use various types of bonds to ensure that vendors perform in a proper and timely fashion.

Preparing a Request for Proposals: Part I

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.

Privacy and Cybersecurity

This session will introduce participants to the State Privacy Office (SPO), explain its role in state government and provide a brief discussion on understanding the current data breach threat. The session will cover the importance of the partnership between Purchasing and the SPO for the protection of the State's data assets. Attendees will learn about the use of the Privacy Impact Assessment (PIA) - an industry best practice for managing data privacy risks; West Virginia's PIA process; and, how the role of the procurement officer is an essential element for holding vendors to the State's privacy and security standards.

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.

RFQs: From A to Z

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. Additionally, this workshop will highlight the evaluation of 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.

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.

Roundtable Discussions

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

Secretary of State Requirements

In addition to discussing how vendors register with the Secretary of State's office and the different business types, this session will also highlight the Freedom of Information Act database, the posting of open meetings, the posting of rules, and provide a basic overview of the Secretary of State's role in state government.

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, direct award purchases, piggybacking contracts and exempt purchases. An overview of the circumstances and procedures for each will be discussed.

State Ethics and Open Meetings Act

The presentation will cover both the West Virginia Ethics Act and Open Meetings Act. Topics that will be discussed related to the Ethics Act will include public contracts, voting, limitations on the placement of the name or likeness of a public official on certain items purchased with public funds, employment restrictions, private gain and gift rules. Topics related to the Open Meetings Act will include an overview of which meetings are subject to the Act, notice requirements, minutes and violations.

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. Disposal of information technology equipment will also be discussed in this workshop.

Vendor Remedies

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.

Vendor Registration

This workshop will discuss the vendor registration program and its requirements, including at what time during your agency's transaction a vendor must register 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. We will also discuss strategies for navigating through records in the *wv*OASIS vendor/customer table.

West Virginia Office of Technology (WVOT) Requirements

This session defines the WVOT Chief Technology Officer review and approval process including the authority in West Virginia Code, the necessary requirements from the requesting agency, and WVOT's procedure for handling such requests. This workshop will also contain references to the IP Board approval process, associated with the statewide personal computer contract; the e-portal Governance Board process (i.e. WV Interactive web services statewide contract); and telecommunications services waivers (IS&C payment authority).

***wv*OASIS Procurement: Part I**

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 portal.

***wv*OASIS Procurement: Part II**

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 portal.