



## *Conference Synopses*

### *Agency Delegated Purchasing*

This session will address purchasing procedures for commodities and services expected to fall under an agency's delegated threshold and discuss the spending thresholds and their bidding requirements within this authority.

### *Alternative Procurement Methods*

This session will highlight four unique purchasing options - emergency purchases, direct awards, impossible to bid items, and items that can be fast tracked - and the documentation required for each. The instances in which each would apply will be discussed.

### *Contracting Basics*

This session will offer an overview of the Purchasing Division and explain its role in state government. As part of this session, attendees will learn about various purchasing methods available to them, contract documents that make up a contract, and how critical contract terms can impact the purchasing process, including time, delivery, and price.

### *Bonds*

This session will address the proper inclusion of bonds into the purchasing process. We will discuss the use of various types of bonds to ensure that vendors perform in a proper and timely fashion.

### *Contract Negotiations*

In this session, participants will explore what they should know about contracts, the market, and the law; when the state can negotiate; and several negotiation strategies that have been proven to work, as well as a few that don't.

### *Developing Specs for RFQs*

This session 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.

### *EOIs and Construction*

This session will highlight the Expression of Interest (EOI) best value procurement process utilized by the state of West Virginia. Participants will learn how EOIs are used to select architects and engineers, as specified in West Virginia Code §5G, based on the vendor's qualifications and demonstrated competence for the type of professional services required at a fee determined to be fair and reasonable. Additionally, participants will gain a better understanding of the rules and requirements of the construction solicitation process.

### *Ethics Act and Open Meetings Act*

Topics relating to the Ethics Act will include recent Advisory Opinions as well as rules governing public contracts, voting, other employment, and private gain and gifts. Topics related to the Open Meetings Act will include an overview of meetings which are subject to the Act, notice and agenda requirements, minutes, and violations.

### *Fleet Management*

This session will provide an overview of Fleet Management and its role in state government, from vehicle ordering to decommissioning. Participants will learn about the services Fleet provides, and the benefits of using those services. Other topics addressed will be the Capitol Complex Motor Pool, the telematics program, and our participation in the driver safety program. Attendees will hopefully gain a better understanding of the role of Fleet Management and its contributions to state government.

### *Forms and Documents*

In this session, participants will learn how to correctly complete the following forms, as well as when and why they are used: Compliance Verification Checklist For Requisition Submission; Vendor Performance; Non-Conflict of Interest; and more.

### *Inspections: Making the Grade*

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

## *Insurance*

This session will address the proper inclusion of insurance into the purchasing process. The basics of insurance will be discussed, as well as the types of coverage that should be required from those vendors wishing to do business with the state.

## *Payment Process*

This session will give an overview of the payment process in wvOasis. The presenter will stress the importance of the vendor name being consistent on the contract, invoice, and in wvOasis. He also will review the communications released from the Auditor's Office in the past year. This session also will look into the common errors the office encounters and offer ways to avoid the rejects associated with these errors.

## *Preparing and Evaluating RFPs*

In this two-hour 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. This session will also highlight the RFP evaluation process from scoring the technical proposal to the cost bid opening.

## *Problem Solving*

In this session, attendees will learn how to apply kaizen (continuous improvement), a Toyota Production System Support Center (TSSC) application, to their daily tasks. Participants will learn the best way to break down problems, identify their root causes, and apply countermeasures that are appropriate.

## *Purchasing Card Program*

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

## *RFQs: From A to Z*

This two-hour session 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 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.

## *Roundtable Discussions*

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

## *Secretary of State Requirements*

This session will discuss business registration requirements, the laws that mandate the filings, what business types are required to register and what types are not, differences in business entity types, DBA names and how they work, searching the business database, and other information collected by the SOS Office.

## *Statewide Contracts*

This session will provide an in-depth look at the purpose and importance of statewide contracts. Participants will gain a better understanding of the statewide contracts available to them, learn the proper use of these contracts, and discuss how to mitigate vendor issues related to such contracts.

## *Surplus Property and Fixed Assets*

This session 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 and compliance requirements, and property availability. In addition, participants will learn the basic requirements of maintaining an agency's inventory in the wvOASIS Fixed Asset System. Adding property, retiring property, data change requests, and annual certifications will be covered.

## *Tools and Resources*

This session will identify and define state purchasing terms, concepts, and principles. An overview of the purchasing decision path will be discussed, as well as the tools and resources that are available to agency purchasers on the Purchasing Division's website, [WVPurchasing.gov](http://WVPurchasing.gov).

## *Vendor Registration*

This session will discuss the vendor registration process, rules, requirements, and reasons behind the program, and will address questions such as 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. Details will be covered related to the electronic vendor/customer registration process and the creation and requirements of the associated documents with wvOASIS. The vendor/customer data table utilized by the vendor registration process, the wvOASIS system's relationship with Vendor Self-Service, and various fee exemption codes will all be examined.

### ***Vendor Self-Service***

This session will focus on Vendor Self-Service, from a vendor's perspective and what they see.

### ***wvOASIS Procurement***

This two-hour session will include an overview of wvOASIS procurement documents, processing, terminology, and system features. The role of commodity codes and encumbrance also will be discussed.

### ***WVOT Requirements***

This session will explore recent and upcoming policy improvements, providing an overview and guidance on the WVOT Chief Technology Officer Review and Approval Policy, revealing the "what, why, who, when, and how." This workshop also will highlight technology statewide contracts, as well as allow participants the opportunity to provide process improvement feedback.