

# THE BUYERS NETWORK

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**THE BUYERS NETWORK** is Published Monthly by the Purchasing Division of the West Virginia Department of Administration to Promote Better Value in Public Purchasing

## Purchasing Division Kicks Off 2012 In-House Training Program with Classes and Webinars



Purchasing Applications Specialist Mark Totten speaks during a 2011 in-house training. The 2012 in-house training program kicks off in January with a session on Agency Delegated Purchasing and a webinar covering Vendor Registration.

The West Virginia Purchasing Division will kick off its 2012 In-House Training Program this month with two sessions, including a webinar.

"I am really pleased with this year's training schedule," said Staff Development Specialist Samantha Knapp. "We are offering a variety of new topics, as well as utilizing new training techniques, such as webinars, to maximize the benefit to state agencies."

The first session, Agency Delegated Purchasing, is scheduled for Wednesday, January 11. This year's curriculum will be conducted in the Purchasing Division, Building 15, 1<sup>st</sup> Floor Conference Room, from 10:30 a.m. to 11:30 a.m. on select Wednesdays.

The only exception will be the Beginner's Track on March 21, which will be conducted in the Regents Room of the State Training Center (Building 7) at the State Capitol campus from 9 a.m. to 4 p.m.

**Please see IN-HOUSE, Page 3**

## Purchasing Division Revises its Agency Buyer Assignments Due to New Staffing

Due to the new additions in the past few months in the Acquisition and Contract Administration's buying staff, the Purchasing Division has modified our buyer assignments to provide more equality in disseminating the work and more efficiency in processing the transactions. This change will be effective January 1, 2012.

The buyer supervisors, Krista Ferrell, Shelly Murray and Roberta Wagner, are responsible for specific buyers and purchasing assistants as well as certain agencies.

Ferrell oversees the work of Senior Buyers Frank Whittaker and Guy Nisbet. Additionally, there is a vacant buyer position under her supervision. Ferrell (File 21) will process all transactions for the Department of Administration. Whittaker (File 44) will handle the Division of Natural Resources, Department of Agriculture, elected officials and miscellaneous boards. Nisbet (File 23) will oversee purchasing transactions for the Department of Environmental Protection.

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- Documentation in Original Electronic Format Best for Archival Purposes of Bid Submission Records
- Always Check the Fine Print to Eliminate Worry
- Even in Emergency, Documentation is Crucial

# Educating Non-Purchasing Officials Important in Explanation of Procurement Requirements

By Purchasing Director Dave Tincher

As we quickly became aware at the 2011 Agency Purchasing Conference, a challenge experienced by many of the agency designated procurement officers is educating others in their organization about the procurement requirements set in *West Virginia Code*, the *Code of State Rules*, and the *Purchasing Division Procedures Handbook*.

Directors, program managers and other individuals who may have a different focus on the organization do not need to become an expert in the state procurement process; however, it became apparent that an overview of the process would be helpful to those holding these positions as well as our agency procurement officers with the responsibility to purchase on the organization's behalf.

As a result, a pamphlet titled, "A Brief Overview of West Virginia State

Procurement," was prepared and distributed to division directors throughout state government. This offering provided general information about the requirements by which the Purchasing Division and agency procurement officers must abide.

Information on public records, the spending limits, purchasing exemptions, mandatory contracts, training, violations to procurement requirements, and the role of the agency designated procurement officer were included in this information material. Helpful resources were also included to assist these officials in learning more about the state purchasing process.



In a cover letter, I stressed the importance of our agency designated procurement officers and the vital role you play to ensure efficiency and effectiveness of how state dollars are being spent.

Our agency designated procurement officers received a copy of the letter and pamphlet electronically for their information. We have made this pamphlet available on

our website and encourage you to share this information with others in your organization as a tool for you to use in explaining our processes and procedures.

We value your partnership in the state procurement process and support the work you do in processing purchasing transactions on behalf of your agency.

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## Documents Created from Original Electronic Format Best for Archival Purposes of Bid Submission Records

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It is the responsibility of the Purchasing Division to ensure that all documents are legible, not only during the bid process but in the permanent archive. These documents include not only charts, spreadsheets, schematics and architectural diagrams, but also the typed specifications, which are all part of the solicitation.

It is for this reason the Purchasing Division requests that, when possible, agencies submit the actual Word, Excel, Visio, AutoCAD, etc. electronic files so that they can be converted to PDF by the Purchasing Division for maximum clarity.

"For example, in *The West Virginia Purchasing Bulletin*, we include detailed documents for every project out for bid," said Purchasing Applications Specialist Mark Totten. "We want to start with the best possible document

clarity at this stage, so throughout any subsequent scans, there is not a loss of legibility by the time it reaches our imaging system."

These documents may be submitted with the Purchase Requisition (WV-35) that is emailed to [purchasing.requisitions@wv.gov](mailto:purchasing.requisitions@wv.gov). "Creating a PDF from the original source file produces a perfect copy of what the document, diagram, chart or map is suppose to look like," Totten said.

Document clarity is important as all information provided to the Purchasing Division is scanned and filed electronically for storage and public post-



ing on the Purchasing Division's website. Once a solicitation has completed the bid process, all information pertaining to that solicitation becomes public record and available for review for the general public, so clarity of all documentation is important.

If the Purchasing Division has concerns about the quality of any submitted documents, we may request agency procurement officers to provide material with

better resolution.

For more information, please contact Totten at (304) 558-7839 or by email at [mark.l.totten@wv.gov](mailto:mark.l.totten@wv.gov).

# Do Not Let Small Print Cause Large Headaches

“Always read the fine print” is a well-known axiom that has been stated for many generations.

Such advice rings true with procurement at the state agency level. The fine print should never be overlooked, especially when an agency is set to issue a release order. Agency officials need to be aware and understand all the terms and conditions contained in a contract prior to issuing a release to avoid potential conflicts afterward.

Likewise, if and when a vendor presents a state agency with additional terms and conditions after a master contract is signed, caution to the details is a must.

“If a vendor submits additional terms and conditions, the procurement officer should verify with the master contract that these terms are conditions are contained therein. Any Service Level Agreements which an agency must sign with a vendor as a result of the contract should be contained within the contract



award. The procurement officer should reject any Service Level Agreement and/or terms and conditions not contained in the master contract and insist that only the contractual terms and conditions be used,” said Krista Ferrell, Buyer Supervisor. “If it appears that there is a conflict that cannot be resolved, the procurement officer should contact the Purchasing Division buyer for the agency to review the file. The terms and conditions that a vendor brings after execution of the contract may cause conflict

because they cannot be honored by the Purchasing Division or the state Attorney General’s Office.”

Open-ended contracts for services, along with statewide and piggyback contracts, are the most susceptible. Likewise, release orders potentially can have such issues.

“When utilizing these contracts, it is important to ensure that terms and conditions provided by a vendor are not referencing other agreements that vendor may have with other groups, such as the Western States Contracting Alliance or the General Services Administration,” said Michael Sheets, Assistant Director for the Acquisition and Contract Administration Section. “The agency should ask that references to terms and conditions with other groups be removed from the quotation.”

Taking such steps, Sheets adds, will keep agencies from experiencing conflict with state rules, policies and procedures and with vendors. For questions, contact your agency designated procurement officer.

## ASSIGNMENTS

Continued from Page 1

Murray supervises Senior Buyers Paul Reynolds and Alan Cummings. Murray (File 31) will process purchasing for the Department of Revenue, Department of Education and the Arts, and the Department of Education. Reynolds (File 43) will process transactions for Department of Commerce agencies, including the Development Office, Forestry Division, Geological & Economic Survey, Division of Labor, Marketing/Communications Division, Miners’ Health, Safety and Training, Division of Tourism and Workforce West Virginia, and the Department of Transportation, excluding the Division of Highways. Cummings (File 33) will process transactions for the Division of Highways.

Wagner oversees Senior Buyer Tara Lyle and a vacant buyer position. Wagner (File 22) will continue to handle purchasing for the Department of Health and Human Resources. Lyle (File 32)

will process transactions for the Department of Military Affairs and Public Safety.

Statewide contracts are being split among the various members of the buying staff. For a complete outline of these changes, please visit <http://www.state.wv.us/admin/purchase/byrassign.pdf>.

“We continue to make every effort to balance the amount of purchasing transactions, while maintaining a comfortable and consistent working relationship with the agencies that we serve. This new assignment keeps some agency-buyer relationships intact, while creating assignments for our newer buyers who have been trained and are ready to have their own file,” said Purchasing Director Dave Tincher. “By dividing the agencies among more of our buying staff, additional resources will be available to better serve the state agencies under our authority.”

## IN-HOUSE

Continued from Page 1

The second session this month, a webinar on Vendor Registration will be offered on Wednesday, January 25.

Space is limited. Registration is given on a first-come, first-served basis. For more information or to register, visit <http://www.state.wv.us/admin/purchase/training/in-house.html>.

For additional questions regarding the Purchasing Division’s 2012 In-House Training Program or any of the webinars to be offered, contact Knapp at (304) 558-7022 or [Samantha.S.Knapp@wv.gov](mailto:Samantha.S.Knapp@wv.gov).

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## Taking a Closer Look at the Purchasing Division's Procedures Handbook...

# Revisions Made to Purchasing Division Handbook

The **Purchasing Division Procedures Handbook** has undergone revisions that went into effect December 15, 2011. These modifications were made to better clarify purchasing procedures. The Handbook can be reviewed in full on our website at: [www.state.wv.us/admin/purchase/Handbook/default.htm](http://www.state.wv.us/admin/purchase/Handbook/default.htm).

The following sections and subjects contain new or updated language.

The definition for Secondary Bid Process has been added in Section 2.

The criteria for spending in Agency Delegated Acquisitions (\$25,000 or less) have been updated in Section 3.2. The new language is repeated in Section 6.1.

New language has been added to Section 4.4.4 which deals with preparing a Purchase Requisition (WV-35) form to note if the agency is working with an existing contract or new one.

Language has been revised in Section 4.7.1.2.1 which deals with Releases in the Preparation of the Requisition chapter. Later, in Section 4.7.1.7.1, language was revised to reflect the appropriate wording, "Lease Purchasing Finance Agreement."

New language was added to Section 4.7.1.8.2 and it notes new requirements with Sole Source Procurements worth more than \$25,000. In Section 4.7.9, new language notes updates to the procedures in the Evaluation Period and new standards for expected completion dates of complex transactions. This section also addresses requirements of evaluator and advisor(s) of solicitations.

Receiving Procedures has revised language in Section 6.3 and it notes the approved formats for receiving reports.



The Evaluation Committee in Section 7.2.4, Request for Proposals has new language which details the updated requirements of the evaluators and advisor(s) involved in this process.

The language which deals with Pre-Bid Conferences in Section 7.2.10 has been revised to reflect updates with vendors who sign in while the meeting is in progress.

The Special Acquisitions chapter has revised language in Section 8.14 which notes which vehicles are outside the scope of the Fleet Management Office and how the Fleet Management Office Executive Director now approves vehicle requests.

Extensive language has been placed in Section 8.17 regarding Radios and Microwave Equipment. The new language reflects a recent Governor's Executive Order which details the steps agencies are now required to take in purchasing these items.

In Exempt Purchases in Section 9, the language dealing with Advertising has been updated.

Agency procurement officials are encouraged to periodically review the Handbook and contact their assigned Purchasing Division buyer with additional comments, suggestions or questions. For a complete list of buyer assignments for each agency, please visit [www.state.wv.us/admin/purchase/byrassign.pdf](http://www.state.wv.us/admin/purchase/byrassign.pdf).

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## Good Response Received to Statewide Contract Usage Survey

The Purchasing Division extends its gratitude to procurement officers who responded to the Statewide Contract Usage Survey questionnaire to our agency. These surveys will be used to ensure that the statewide contracts currently in place are of value to state agencies. The Purchasing Division is

currently reviewing all statewide contracts which are mandatory for use by state agencies. Upon a final division, the Purchasing Division will notify agency procurement officers of the statewide contracts that may be eliminated.

Due to the time and extensive work required in creating the specifications

and awarding of these contracts, it is important that the Purchasing Division focuses its attention on the appropriate commodities and services, based on the frequency of need by state agencies. Statewide contracts can be reviewed at <http://www.state.wv.us/admin/purchase/swc/default.html>.

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# Documentation is Crucial, Especially in Emergencies

One of the more startling scenarios procurement officers face is the potential to receive a telephone call in the middle of the night with news that there is an emergency situation at their state agency.

It could be a hole in a roof; a power source is suddenly not working; or any other situation that would require immediate attention. Whatever the circumstances dictate, it is important to remember to adhere to emergency purchases as dictated by *West Virginia Code* and Purchasing Division procedures.

One of the primary requirements for emergency purchases is the approval of the Purchasing Director. If an emergency occurs outside of regular business hours, an agency may proceed with the emergency purchase and must provide immediate justification of the action to the Purchasing Director or his designee on the first working day following the emergency.

“Unfortunately, such moments do occur. Yet, even in the most demanding situations, it is essential for procurement officials to document the justification for the purchase,” said Buyer



Supervisor Shelly Murray.

Documentation is noted in *West Virginia Code* §5A-3-15, which states, in part, that, “A report of any such purchase, together with a record of the competitive bids upon which it was based, shall be submitted at once to the director by the head of the state spending unit concerned, together with a full account of the circumstances of the

emergency: *Provided*, That the director may waive the need for the record of competitive bids. Such report shall be entered on a record and shall be open to public inspection.”

When documenting emergency purchases \$25,000 or less, section four of the **Purchasing Division Procedures Handbook** notes that a minimum of three written bids, if possible, should be obtained; original written bids and a written agency justification must be attached to the agency file; and an agency Purchase Order (**WV-88**) or a TEAM-generated purchase order is required if the purchase exceeds \$2,500.

If the emergency purchase exceeds \$25,000 and occurs during normal business hours, purchases require verbal approval by the Purchasing Director or his designee prior to mak-

ing the purchase or the execution of any work and a written explanation must be provided immediately via fax which should include the estimated cost of the purchase. Other requirements for these purchases include a minimum of three

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**Please see DOCUMENTATION, Page 6**

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## Purchasing Division Announces Advanced Certification Program

Nearly one year ago, the Purchasing Division certified the first agency purchaser through its WV Procurement: Basic Certification Program, which was introduced at the 2009 Agency Purchasing Conference. In that year, a total of 19 state agency procurement officials and Purchasing Division buyers have achieved the basic-level certification, while 22 others continue to progress through the program.

These graduates and their peers can now set their sights on the WV Procurement: Advanced Certification Program, which is open to those who have successfully completed the Basic Certification Program's final exam. Fittingly, the Advanced Certification Program requires participants to complete more intricate standards than its predecessor.

In addition to completing the Basic Certification Program, other stipulations require that the agency purchaser:

- Attend at least three different Purchasing Conferences (2009 - present) and complete 30 different classes or learning sessions. No class or learning session shall be repeated in any one year, regardless of format.
- Achieve three years of experience in public procurement (from January 1, 2009 - present) and receive verification by immediate supervisor and agency head that the scope of work involves a level of 75% or greater of public procurement responsibilities for the respective agency in a professional, not support-level, role.

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**Please see PROGRAM, Page 6**

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# Contract Now Signed, Sealed and Delivered for State ERP System

State officials signed a contract for a new statewide software system that will change the procurement process and the way that state government does business. The contract for the long-awaited Enterprise Resource Planning (ERP) system was signed by Gov. Earl Ray Tomblin, state Auditor Glen Gainer and Treasurer John Purdue in December.

The eight-year, \$98 million dollar contract is with CGI Group Inc., a Fairfax, Va.-based company. The system will be called OASIS, which stands for Our Advanced Solution with Integrated Systems. The program will handle procurement, human resources, payroll, procurement and financial and treasury management.

Auditor Gainer said the system will completely rework how agencies do business. "It is a complete and total overhaul of the business processes within state government," he said. "Everything will be handled the same across state government, and we will all be able to use the same system to manage those activities."

Purchasing Division's Technical Services Unit Manager Dan Miller said they have met with the procurement and inventory leads from CGI and they are discussing the next steps. Currently, CGI is reviewing the as-is documentation and mapping the requirements listed in the Request for Proposal (RFP) to functions in the software.

"CGI is very excited and committed to make this project a success," Miller said.

The contract is the result of a 10-year effort to find a way to merge the 118 different systems across the state to keep better track of taxpayers' money and provide greater government oversight. Citizens will be able to access the system through a public portal, which Gainer said would boost transparency and accountability.

CGI estimates that by the end of the eight-year phase in, the state will have recouped the initial investment and additional hours it will have taken to install and maintain the program. By the 10th year of the program, CGI estimated taxpayers will see a savings of \$150 million.

## PROGRAM

Continued from Page 5

- Perform training at the agency level on procurement-related topics (i.e. Purchasing cards, Requests for Quotations and/or Proposals, etc.). The Purchasing Division must approve the training content and target audience prior to the scheduled training. The candidate is responsible for planning the logistics.
- Successfully complete an advanced-level examination.

To review the advanced certification requirements in their entirety, visit <http://www.state.wv.us/admin/purchase/training/Certification/default.html>.

"Through the Purchasing Division's certification program, state agency purchasers continue to demonstrate the commitment and integrity needed to obtain a high level of expertise in the state's procurement process, and rightfully so, are recognized for their achievements," said Samantha Knapp, Purchasing Division Staff Development Specialist. "The Program has received considerable positive feedback and is proving to be quite beneficial to the participants, their agencies and the state procurement process in general."

## DOCUMENTATION

Continued from Page 5

written bids, if possible; the awarded vendor must be properly registered and in good standing with the Purchasing Division; original written bids shall be attached to the purchase requisition and submitted to the Purchasing Division with a letter of justification or a copy of the Director's or his designee's written approval and a completed WVFIMS coversheet (P-Doc) shall be included.

"When procurement officers are facing emergency purchases, the best approach is to exercise sound judgment and avoid the appearance of taking any action that could be perceived as inappropriate," Murray said. "And document, document, document."

Emergency purchases are detailed in Section 4.7.1.4 of the Handbook and can be reviewed at <http://www.state.wv.us/admin/purchase/handbook/2007R15/hand4.htm>



*The West Virginia  
Purchasing Division Staff Wishes  
All of our Agency Purchasers  
a Happy and Prosperous 2012!*

# Current Statewide Contract Update

(As of December 15, 2011)

This page includes a listing of current changes made to statewide contracts issued by the Purchasing Division. Information and dates listed in this **Current Statewide Contract Update** are subject to change. All statewide contracts are available online at <http://www.state.wv.us/admin/purchase/swc>. For more information, please contact your assigned agency buyer.

## Out for Bid

Contract	Description	Pre-Bid Meeting	Bid Opening
ALCOHOL12	Ethyl alcohol	No	01/05/2012

## New Awards

Contract	Vendor	Description	Dates
RECMGT11	Cornerstone Records Mgt.	Records management	12/01/2011 -11/30/2012
CANLINE11A	Calico Industries	Trash can liners	11/15/2011 -11/14/2012

## Under Evaluation

Contract	Description	Bid Opening	Under Eval
IP11	Computers	11/15/2011	Yes
LARMS11	Enterprise and Select Software (Large Account Resellers for Microsoft Products)	11/15/2011	Yes
LABSUP11	Lab supplies		Yes
HRDEV11	Online personnel assessments	12/21/2011	Yes
SBUS12	School buses	12/01/2011	Yes
MV12	Motor vehicles	12/13/2011	Yes
PC12	Police cruisers	12/22/2011	Yes

## Renewals

Contract	Vendor	Description	Date
DIGCOP09A	Aarons	Digital copiers	11/15/2011 -01/14/2012
DIGCOP09BA	Canon	Digital copiers	11/15/2011 -01/14/2012
DIGCOP09C	Komax Business Systems	Digital copiers	11/15/2011 -01/14/2012
DIGCOP09D	Kyrocera Mita America	Digital copiers	06/15/2011 -01/14/2012
DIGCOP09F	REMCO Sales & Service	Digital copiers	11/15/2011 -01/14/2012
DIGCOP09G	Ricoh	Digital copiers	11/15/2011 -01/14/2012
DIGCOP09I	Superior Office Service	Digital copiers	11/15/2011 -01/14/2012
DIGCOP09J	WV Business Products	Digital copiers	11/15/2011 -01/14/2012
DIGCOP09A	Aarons	Digital copiers	11/15/2011 -01/14/2012
OIL10A	Mathews Lubricants Inc.	Grease, oils and lubricants	12/16/2011 -12/15/2012

## Renewals

Contract	Vendor	Description	Date
MOTL10AE	Heldreth Motel & Restaurant	Motel/hotel accommodations	12/07/2011 -12/06/2012
MOTL10AG	Holiday Inn Express & Suites	Motel/hotel accommodations	01/01/2012 -12/31/2012

## Contracts Extended

Contract	Vendor	Description	Date
CPHONE07B	AT&T Mobility	Cellular phones	12/01/2011 -06/30/2012
CPHONE07C	Verizon	Cellular phones	12/01/2011 -06/30/2012
MA05SW08A	Oracle Software	Oracle Master Agreement	12/01/2011 -11/30/2012
MV11H	Hurricane Chevrolet	Motor vehicles	11/15/2011 -02/14/2012
MV11A	Stephens Auto Center	Motor vehicles	11/15/2011 -12/14/2012
MV11F	Glen Dale Motor Company	Motor vehicles	11/15/2011 -12/14/2011
MV11G	White Side Chevrolet	Motor vehicles	11/15/2011 -12/14/2011

## Contracts Reviewed

Statewide contracts are reviewed approximately three months prior to the actual expiration date. During this review process, the state buyer examines the specifications and the products.

### JANUARY

ABATMNT .....	Asbestos abatement
BEDDING .....	Mattresses, box springs and pillows
DIGCOP .....	Digital copier equipment
MVU .....	Used automotive vehicles
PC .....	Police cruisers
SYSFURN .....	Modular system furniture

### FEBRUARY

IPT .....	Internet protocol voice communications
ITECH .....	Technical support
LDPHONE .....	Long distance phones
PPHONE .....	Pay telephones
SIP .....	Personal computers and peripherals

# Questions?...Just Ask Us!

Are you unsure of certain purchasing procedures? Do you need information on the current state travel regulations? Do you have a question regarding travel requests? Would you want to know what surplus property is available?

If you need additional information concerning any function within the Purchasing Division, complete the form below and return to the address below. You also may forward your request via e-mail.

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