

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 Announces Positive Changes and Additions in 2013 In-House Training Schedule

The West Virginia Purchasing Division is pleased to release the schedule for the 2013 In-House Training Program. The 2013 schedule will offer changes in classes, class groupings, and webinars to ensure the sessions continue to meet the needs of procurement officers statewide.

To make these trainings more time-effective and beneficial for state agency purchasers, the new schedule includes several half-day sessions which cover multiple topics. Staff Development Specialist Samantha Knapp said the change came from requests from procurement officers located outside of the Charleston area. "The goal is to make sure procurement officers receive the most out of their time spent away from the office, especially if they are traveling in from out of town," Knapp said.

The 2013 schedule will also offer a new session on *wvOASIS: Commodity Codes* to assist agency purchasers with the transition to the new Enterprise Resource Planning system, as well as four webinars. These webinars will be available to any procurement officer interested in participating. In addition to these webinars, the Purchasing Division will add two webinars to its 2013 training



Purchasing Director Dave Tinchler presented on "The Guiding Values and Principles of Public Procurement" during an in-house workshop.

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Class Materials Available Online in Advance of the 2012 Agency Purchasing Conference

Final preparations are being made for the 2012 Agency Purchasing Conference, scheduled for November 13-16 at Stonewall Resort State Park. To allow attendees the opportunity to print off the materials needed for their classes in advance, the PowerPoint presentations for each class have been posted to the Purchasing Division's website. Participants will be responsible for bringing these handouts, if they wish to follow along. The only exception will be for registrants in the Beginner's Track, who will receive a binder containing all six presentations. All PowerPoint presentations are available for viewing and download at <http://www.state.wv.us/admin/purchase/conference/agency/2012>.

Any conference attendees with dietary restrictions should contact Staff Development Specialist Samantha Knapp in advance so any particular needs can be met. For questions about the 2012 Agency Purchasing Conference, contact Knapp at (304) 558-7022 or at Samantha.S.Knapp@wv.gov.



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Annual Purchasing Conference Attendance Vital to State Agency Procurement Officers

By Purchasing Director Dave Tincher

Before the beginning of each fiscal year, the Purchasing Division communicates with each agency to determine who will serve as the agency procurement officer, as designated by the agency director. These individuals, who are carefully selected to serve in these roles, carry a great amount of responsibility. It is these selected few who must ensure that the manner in which taxpayers' dollars are spent are done so efficiently, ethically and in accordance with all state laws and rules.

The best opportunity for these designated agency purchasers to become knowledgeable in the state procurement process is to attend the Purchasing Division's annual purchasing conference. This year's conference is right around the corner. On November 13 through 16, nearly 300 agency purchasers will join together to enhance their skills and understanding of their vital role in state

government.

In accordance with the *Code of State Rules* 148CSR1, "all purchases must be approved by the secretary or head of the spending unit, or a designee, whose name shall be filed with the Director. The person(s) named should take available purchasing training and have responsibility for the function of purchasing. Each spending unit shall process all purchases through this person(s), who shall be responsible for correspondence and communication with the Purchasing Division."

If you are unsure who is designated from your agency as your organization's lead procurement officer, visit <http://www.state.wv.us/admin/purchase/vrc/agencyli.html>

All agency designated procurement



persons are expected to attend training offered by the Purchasing Division. In addition to the many workshops and general sessions offered to perfect agency purchasers' knowledge base, there is also the benefit of networking at this conference with other public purchasers from state agencies and the Purchasing Division. These informal discussions often

lead to innovative solutions to issues that are common among all purchasing professionals.

My staff and I extend our enthusiasm to all of our agency partners regarding our upcoming conference. It is our hope that everyone in attendance expands their understanding and appreciation of public procurement practices in the state of West Virginia.

Attention to Detail Crucial When Working with IT Purchases

West Virginia Code §5A-6-4 mandates that state agencies pursuing **data processing procurements must first obtain approval from the state Chief Technology Officer (CTO). This step precedes the solicitation process state agencies undertake with the Purchasing Division.**

Procurement officers are reminded to thoroughly review the memorandums from the CTO at the outset of the process as there may be more than one approval needed throughout the solicitation process.

"Often in the memo issued by the CTO, there is a stipulation that if the purchase is more than \$50,000 the agency will need a secondary approval from us," said Sharon Lacey, an Information Systems Consultant III with the Office of Technology. "The memo does not necessarily mean we are approving the entire project. There are instances in which state agencies must come back to us after the initial approval for yet another approval

before the next step in the procurement process can be completed. This is why it is very important for procurement officers to carefully read the entire memo issued by the CTO."

Krista Ferrell, Buyer Supervisor at the Purchasing Division, concurs.

"The approval level for a solicitation with IT specifications can be multi-tiered, particularly when it relates to a RFP. We cannot move forward with a solicitation without proper CTO approvals. Even after the initial CTO approval letter is granted, there are times in which we cannot continue with a solicitation or even an award unless a second, and sometimes third, approval is granted by the CTO, as written in the approval letter. Adhering to the approvals at the proper time in the procurement cycle will eliminate unnecessary delays."

Lacey offers some tips to keep the process moving once an agency determines it has a need to acquire items.

"Many equipment purchases, particularly medical equipment, will have IT requirements, whether it is a computer or monitor and/or software. This sometimes gets overlooked but these requests need to come to us before going to the Purchasing Division," Lacey said. "Also, there are times when we receive letters without proper justification or incomplete information. When preparing justification for the Office of Technology a good rule of thumb is to include a description of product, location of equipment, cost, benefits of the product and backup documentation. Additionally, when organizing the information for submission to the Office of Technology, the Purchasing Division's RFP approval process checklist is an excellent template for procurement officers to use as a guideline."

For more information, please refer to Sections 4.6.1.4 and Section 8.3 of the **Purchasing Division Procedures Handbook**.

Quality Control and Transparency Plays Vital Role in Maintaining the Procurement Process

This is part of an on-going series of articles which takes a closer look at the inner workings of the Purchasing Division. This article looks at the Communication and Technical Services Section.

The maintenance and archiving of quality documentation throughout the procurement process is vital to offer a clear, concise record of the requisition process as well as to ensure transparency of the function and outcome. The responsibility falls under the auspice of the Technical Services Unit of the Communication and Technical Services Section of the Purchasing Division.

Purchasing Applications Specialist Mark Totten said he always emphasizes the importance of agencies submitting the original electronic document, such as Microsoft Word, Excel, Visio or AutoCAD documents. "When you print out a document and submit it to us, so much of the quality of the document is lost by the time we receive it, scan it and post it online," Totten said. "We republish documents for both solicitation and archival purposes, and we want to offer the best quality possible when vendors are reviewing before submitting a bid proposal, during the evaluation process, and then afterwards when the documentation becomes part of the public record."

Totten said the preferred method is to receive the documents from an agency in their original electronic format and then to convert the document in house to a PDF so that there is no loss of resolution through the process. "It gives us better



Quality Control and Transparency Specialist Lu Anne Cottrill, left, and Purchasing Applications Specialist Mark Totten work to ensure good quality documentation is available throughout the procurement process.

quality documents at every part of the procurement process, and that helps vendors during the out-for-bid stage, agencies during the evaluation process, and that also helps the public," he said. "It is truly a win/win/win for everyone."

Maintaining the quality of documents is vital for transparency, Totten said. "To us, 'transparency' is not just a buzzword," he said. "There are multiple regularly-maintained information sources and reports we provide online that are related to the Purchasing Division's workload."

Totten works with Quality Control and Transparency Specialist Lu Anne Cottrill on making sure all parts of the procure-

ment process are apparent. "The part of the procurement process first seen outside of state government begins with the solicitation, which we post online in the West Virginia Purchasing Bulletin," Cottrill said. "Then there are things such as the Daily Requisition Tracking Report, which is updated every business day on the division's intranet site."

Cottrill said the requisition status report, available to state government agencies, shows "the life cycle of an requisition." "We also post a Notice of Award Report weekly within the West Virginia Pur-

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WESTLAW Provides Invaluable Research Tools for State Agencies

When it comes to research, time is always of the essence. Thanks to technology, the capability to research, locate and gather information is faster than ever and continues to progress more as new technologies are constantly being introduced.

Such is the case when it comes to researching legal matters, a component needed in nearly every state agency. The Purchasing Division offers the statewide contract, WESTLAW, which

is a legal research subscription service. The Purchasing Division operates WESTLAW through its alliance with the National Association of State Procurement Officials (NASPO), ensuring greater volume of buying to secure the company's best possible prices.

"West Virginia is one of eight states participating under the WESTLAW contract through its agreement with NASPO," said Assistant Purchasing Director Mike Sheets. "Subscriptions and

publications are exempt by Purchasing Division guidelines but this cooperative contract offers price stability for this type of service."

Purchasing Division Attorney James Meadows said the primary services available on this contract and, a similar service provided by Lexus Nexus, include research on legal matters, statutes, resolutions and court cases.

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Procurement Officer Profile

History and Efficiency Good Combination for Melissa Smith

As the executive director of the West Virginia Courthouse Facilities Improvement Authority (WVCFIA), Melissa Garretson Smith finds herself wearing many hats. She is part of a two-person agency, which means she finds herself doing a little bit of everything. However, her primary focus is working with county commissions and courthouses.

“Most of our 55 county courthouses in the state are historic structures, so our mission is to preserve the buildings the best way possible,” she said.

That was not what she originally intended as her life career, though. Smith, a Boone County native, originally wanted to become a state park manager. Her family traveled extensively when she was growing up, and she found herself drawn to work in hospitality. She earned a bachelor’s degree in travel industry management from Concord College and a master’s degree in recreation and parks management from West Virginia University. She found out quickly, though, an unspoken rule in the industry.

“I found that if you work in hospitality, you do not travel because you work weekends,” she said with a laugh.

Smith began working with the Sheriff’s Association and came to WVCFIA two years ago. Smith said the WVCFIA works in awarding competitive grants to counties. “Most of the courthouses, because of their age, are not efficient, so we work to make them more efficient,” she said. “Part of that has included converting unused jail space into offices, or working to improve the building while maintaining its historic integrity.”

With a \$2 million-a-year budget that comes from membership fees paid by the counties themselves, the agency is focused on awarding grants to the counties as well as finding grant opportunities outside of the system, Smith said.

Because her agency itself is so small, with most of its purchases being basic office expenditures, Smith said much of her procurement training comes into play working with grant-awarded



Melissa Garretson Smith said a love of travel originally inspired her career pursuit, but she’s found a comfortable place in the Courthouse Facilities Improvement Authority.

counties, since the counties must follow state purchasing guidelines. That was a primary motivation for Smith to earn her Purchasing Division Basic Certification. “I am always receiving calls from counties, asking if they are doing things right,” she said. “I wanted to be able to help them the right way and to be successful.”

SWAM Reporting Tool Required of All State Agencies Each Fiscal Year

The Purchasing Division has been busy implementing the small, women- and minority-owned (SWAM) business certification, which is now included as part of our vendor registration forms. Effective July 1, 2012, the **Vendor Registration and Disclosure Statement and Small, Women- and Minority-owned Business Certification** combined on one form the requirement for vendors wishing to register with the Purchasing Division and, if applicable, the designation criteria for SWAM certification.

As an agency requirement of the SWAM procurement certification, the Purchasing Division notified all agency designated procurement officers on June 29, 2012, that **West Virginia Code §5A-3-59 (b)** requires state agencies to submit annual progress reports on small, women- and minority-owned business procurements to the Purchasing Division of the Department of Administration.

To assist agencies in collecting and maintaining this data, the Purchasing

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Purchasing Division Initiates New Buyer Trainee Program as Purchasing Assistants Change Roles

The Purchasing Division had introduced a new buyer trainee orientation program as it moves two purchasing assistants into buyer trainee positions. The program is a year-long orientation intended to give trainees a solid background and knowledge of the state purchasing process.

“We have not had buyer trainees in several years, but felt like this was an excellent opportunity to develop talent in-house and grow the division from the ground up,” said Mike Sheets, Assistant Purchasing Director for the Acquisition and Contract Administration Section. With that in mind, former purchasing assistants Evelyn Melton and Crystal Rink have been selected as buyer trainees. “We felt both were extremely talented and very suited for the positions,” he said. Melton has a bachelor's degree in civil engineering and Rink has a bachelor's degree in psychology.

Sheets called the program “a roadmap for progression” modeled after the buyer orientation program which began earlier this year. Buyer trainees will be introduced to different aspects of procurement, attend training sessions, observe assigned senior buyers and buyer supervisors, learn about the TEAM automated purchasing system and Requisition Tracking (ReqTrak) system, and review the Purchasing Division Procedures Handbook, Code of State Rules and West Virginia State Code.



Former purchasing assistants Evelyn Melton, left, and Crystal Rink have moved into buyer trainee positions. Melton and Rink will participate in a year-long orientation program for the positions.

Buyer trainees will not be assigned their own files but will assist with contracts as they are processed. “We wanted a series of steps that allowed for strong progression and growth,” Sheets said. “With a solid foundation behind them, the buyer trainees can better give service and attention to the agencies.”

After the required experience and training, it is the goal of the Purchasing

Division to evolve these positions into buyers and senior buyers.

“There’s going to be a lot of training going on in the coming months to shape us, which I believe is all in the right direction,” Melton said.

Rink agreed. “The purchasing assistant position was a wonderful way to get our feet wet, but this lets us go further into the purchasing process,” she said.

Inspection Unit Finds Better Results with Recent Assessments

The Purchasing Division’s Inspection Services Unit continues its charge to review and audit state spending unit requests, purchases and other transactions and performances within the Purchasing Division’s authority.

Contract Manager Don Arrick, of the Purchasing Division, is pleased with the progress that state spending units are displaying in adhering to *West Virginia Code*, *Legislative Rule* and Purchasing Division policy.

“We have been in the ‘second round’ of auditing most of the agencies within

our authority and we are seeing the total number of findings and problem transactions being reduced by 20 to 40 percent in most cases,” Arrick said. “These are excellent results for our inspections and demonstrate that the various Purchasing Division educational efforts are having a positive impact on to our agency procurement officer partners.”

Still, Arrick said, one particular issue remains from the audits.

“With a good many agencies, we are still seeing the same stringing incidents that we had in the initial inspections.

Part of the mission of our audits is to inform and educate our procurement partners and this is one issue we will continue to work on in the future,” he said.

The Purchasing Division defines stringing as “issuing a series of requisitions or purchase orders to circumvent competitive bidding or to defeat the State Purchasing Card transaction or delegated purchasing limit.”

“I think it is important to remember

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An Informative Discussion on Education Procurement

Tim Easterday, Director of Purchasing for the Kanawha County Board of Education, spoke to the Purchasing Division staff in October about the similarities and differences between his office's duties and that of a state agency purchasing officer.

The presentation to the Purchasing Division staff was the latest in a monthly in-house professional development series to enhance a better understanding of purchasing on various levels of government throughout the state. Each month, a guest speaker gives an insider's perspective on a particular government function. The Purchasing Division expresses its appreciation to Easterday and others who have taken the time to speak with our staff.

RFQ Templates Available on Intranet

The Purchasing Division has updated several sets of templates related to Request for Quotation purchases, which have been posted to the agency's intranet site.

"These templates related to Request for Quotation purchases were created to better streamline the paperwork process for all state agencies under our purchasing authority. They are a collaboration of discussions from the last few months between our agency and our agency partners," said Purchasing Division Attorney James Meadows. "We recently updated these templates and they will be subject to additional modifications if and when it they may be made more user-friendly."

The updated templates relate to Catalog Discount RFQ Standard Format, One-Time Purchase RFQ Standard Format, and Open-End RFQ Standard Format. They may be accessed by visiting:

<http://intranet.state.wv.us/admin/purchase/procedures.html>

WESTLAW

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"The technology involved with WESTLAW allows for an attorney to research a particular subject matter all in one location. It used to be that one would find themselves going through an assortment of books and journals to get a complete picture of a particular matter. Now, this provides a great deal of research in one location," he said. "Any state agency that has a legal department should consider this type of service."

To learn more about WESTLAW and other statewide contracts, visit:

<http://www.state.wv.us/admin/purchase/SWC>

QUALITY

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chasing Bulletin, with shows everything awarded for that time period and listed by the solicitation number," she said.

Events such as public bid openings, which were once the only way vendors knew immediately how much competing vendors bid on a project, have changed in these electronic times, Tot-

ten said, with the posting of bids online. "Opened bids are online and available usually within a day, and searchable by the day of the opening and the solicitation number," he said. "It saves our employees' time and vendors' and agencies' expense for this information to be easily available online."

RESULTS

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that the Inspectors are great resources to rely on to better understand the purchasing process. I encourage procurement officers to communicate with us so that we can facilitate a more efficient way to ensure proper transactions are completed," Arrick said.

Per State Code, the Purchasing Division reports to the State Legislature

twice a year of stringing activity, noting specific information such as agency and stringing activity found during our inspections.

To learn more about the Purchasing Division Inspection Services Unit, visit:

<http://www.state.wv.us/admin/purchase/inspection>

IN-HOUSE

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schedule aimed at educating vendors on the state purchasing process. More information will be available at a later date.

All training workshops will be conducted on the Capitol Complex in Charleston, either in the Gaston Caperton Training Center in Building 7 or the Purchasing Division's 1st Floor Conference Room in Building 15. Participants will receive an email reminder one week prior to each session, which will include the exact location for the respective classes. 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/inhouse.html>.

For questions regarding the 2013 In-House Training Program or any of the webinars, contact Staff Development Specialist Samantha Knapp at (304) 558-7022 or Samantha.S.Knapp@wv.gov.

Buyers Network

Current Statewide Contract Update

(As of October 15, 2012)

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	Bid Opening	Pre-bid?
DIGCOP12	Digital copiers	10/23/2012	No
NTIRES12	New tires	11/14/2012	No

New Awards

Contract	Vendor	Description	Dates
FASTEN12	Grayson Industries	Fasteners	10/01/2012 -09/30/2013
LGLOVES12	Performance Safety Group Inc.	Examination gloves	10/01/2012 -09/30/2013
MAILEQP12	Pitney Bowes	Mailing machines	09/10/2012 -10/11/2013

Under Evaluation

Contract	Description	Bid Opening	Under Eval
ERCYCL12	Recycling of used electronic equipment	08/09/2012	Yes
IP12	Computer systems	08/07/2012	Yes
MV13	2013 or present model motor vehicles	09/20/2012	Yes
SUPFOOD12	Supplemental food items	10/11/2012	Yes

SWAM

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Division created a SWAM Reporting Tool, which is available on the Purchasing Division's intranet under *Processes and Procedures*. This intranet page may be accessible at the following link:

<http://intranet.state.wv.us/admin/purchase/procedures.html>

At the end of each fiscal year, this Excel spreadsheet must be completed noting all contracts or purchase orders issued to SWAM vendors. The information to be noted includes the fiscal year, vendor name, TEAM #, contract/purchase order number, description, total amount, and date of award. This report may be submitted electronically to the Purchasing Division through the purchasing.requisitions@wv.gov email account.

Should you receive any questions relating to the vendor registration procedures or the SWAM certification, please direct vendors to our new webpage focusing on these programs. This webpage may be accessed directly at:

<http://www.state.wv.us/admin/purchase/VendorReg.html>

Contracts Renewals

Contract	Vendor	Description	Date
ITECH10U	Global Nest LLC	Technical support	03/01/2012 -02/28/2013
MOVE11DC	Myers Transfer & Storage	Moving services	11/01/2012 -10/31/2013
MOVE11DA	DeMary Bros. Transfer Inc.	Moving services	11/01/2012 -10/31/2013
DISH10	Ecolab Inc.	Dishwashing dispensing equipment	10/01/2012 -09/30/2013
LAUNDRY11	Ecolab Inc.	Laundry services	10/01/2012 -09/30/2013

Contracts Reviewed

Statewide contracts are reviewed approximately three months prior to the actual expiration date. During this month, the following statewide contracts for which their expiration dates are approaching will be examined.

DCBATT11	Dry cell batteries
LAUNDRY11	Detergents
MOVE11	Moving services
OIL	Automotive engine oil
RECMGT	Offsite storage and records management

FOR MORE INFORMATION

Below is a list of Purchasing Division buyers assigned to specific state agencies.

FILE	BUYER	EMAIL	PHONE
21	Krista Ferrell	Krista.S.Ferrell@wv.gov	558-2596
22	Roberta Wagner	Roberta.A.Wagner@wv.gov	558-0067
23	Guy Nisbet	Guy.L.Nisbet@wv.gov	558-8802
31	Shelly Murray	Shelly.L.Murray@wv.gov	558-8801
32	Tara Lyle	Tara.L.Lyle@wv.gov	558-2544
33	Alan Cummings	Alan.W.Cummings@wv.gov	558-2402
43	Paul Reynolds	Paul.Reynolds@wv.gov	558-0468
44	Frank Whittaker	Frank.M.Whittaker@wv.gov	558-2316
51	Connie Oswald	Connie.S.Oswald@wv.gov	558-2157

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.

Diane Holley-Brown, Assistant Director
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Charleston, WV 25305-0130
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Name _____
Organization _____
Address _____
Telephone Number _____
E-Mail Address _____
Need Information about _____

In This Issue... Did You Read About?

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- Keeping documents clear and legible part of procurement transparency.
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- All state agencies are required to use SWAM reporting tool.
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- Inspection Unit pleased with recent results.
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STATE OF WEST VIRGINIA

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