

THE BUYERS NETWORK

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THE BUYERS NETWORK
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Better Value in Public Purchasing

Purchasing Division Joins the State Auditor's Office in Presenting its Bi-Annual Training for State Officials

Approximately 100 state officials gathered at the West Virginia State Training Center on November 16 to learn more about the state purchasing process and Purchasing Card Program. The training, mandated by *West Virginia Code* §5A-3-60, requires the state's high-level officials to attend two hours of training on purchasing procedures and purchasing cards each year.

This training, offered twice in person each year, provides the state's high-level officials with a comprehensive review of the rules and regulations that guide the state's purchasing process and the Purchasing Card payment method. West Virginia state agencies must comply with all necessary laws and rules to ensure state's taxpayer dollars are spent wisely.

Purchasing Director Dave Tincher welcomed the esteemed audience and explained the Purchasing Division's authority and organizational structure. Providing additional information



Purchasing Director Dave Tincher speaks at the bi-annual training on State Purchasing Procedures and the Purchasing Card Program. Justin Southern of the Auditor's Office films the presentation to be posted later online.

Please see **PROCUREMENT TRAINING**, Page 3

Additional Bonding Requirements for Change Orders Needed for Construction Contracts When Cost Increases

Vendors who submit bids for construction projects are most often required to obtain performance and labor and materials bonds. However, when the awarded contract later requires a change order with a cost increase, the vendor must also obtain a bond rider to cover that increase.

This means that the amount of the contract increase is insured by a third party, covering the state of West Virginia should the vendor default.

The bond rider is requested from the surety by the vendor. Failure to obtain the necessary documentation from the surety will result in the Purchasing Division being unable to issue the change order.

Agencies should be aware of the documentation which must be submitted to the Purchasing Division before the change order may be processed. The bond rider from the third party insurer must contain a cover page,

Please see **BOND REQUIREMENTS**, Page 3

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- Secretary of State's Office Prepares for Mandated FOIA Database, Effective January 1
- Purchasing Division Welcomes New Senior Buyer to its Staff

MARK YOUR CALENDAR NOW! The 2016 Agency Purchasing Conference is Set for September 27-30 at Canaan Valley Resort.

THE DIRECTOR'S COMMENTS

Workflow within wvOASIS Affects Both Agency Purchasers and Purchasing Division Staff

By Purchasing Director Dave Tincher

During the holiday season, it offers an opportune time to spend time with friends and family. Within state agencies as well as the Purchasing Division, employees may schedule time away from the office. Therefore, I thought this would be an appropriate time to discuss time management and how it effects the procurement processing time.

As many of you are aware, workflow is now documented within wvOASIS, with review of documents and approvals being made within the system. The worklists for those having access in the system may become daunting at times. And, each agency has its own set of priorities.

Whether a state entity is buying commodities or services, each procurement transaction serves a purpose in that it complements the agency's mission. Likewise, the Purchasing Division has its own goals, with our primary objective being

able to award solicitations fairly and accurately to the lowest responsible bidder in the least amount of time possible.

Our Purchasing Division buyers each have a worklist within wvOASIS in which the procurement transactions that they oversee are accessible for action. For most of our buying staff, they process purchases for several agencies. Typically, requests are handled in the order in which they are received. With the holiday season, it is important that the lines of communication remain open both between the agencies and the Purchasing Division as well as within each organization regarding its priorities.

One way in which agencies can assist in the expediting of their own procure-



ments is to complete the appropriate solicitation documents accurately and thoroughly; write specifications as clearly and concisely as possible; and, most importantly, double-check your work. Incomplete and inaccurate documents only lengthen the processing time.

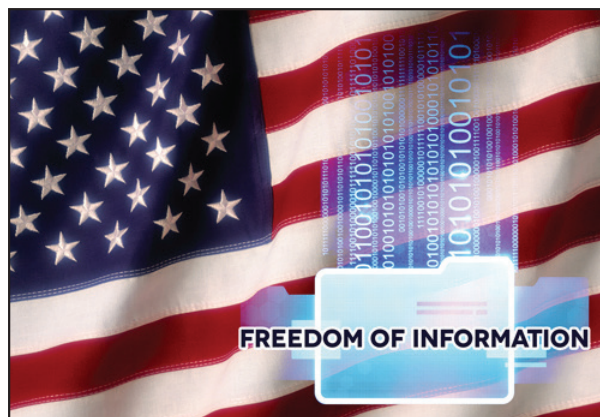
Should you have a purchase that needs immediate attention, contact your Purchasing Division buyer and make him or her aware so we can best accommodate crucial needs of your agencies. However, be reminded that our buyers and professional staff work diligently to address the needs of all of the agencies under our authority. We strive to work together to make the state procurement process effective and efficient.

Secretary of State's Office Prepares for Mandated Freedom of Information Act Database to Become Effective on January 1

In late October of this year, the Purchasing Division shared information from the Secretary of State's (SOS) office relating to the new Freedom of Information Act (FOIA) database that is targeted to begin on January 1, 2016.

House Bill 2636, which was passed during the 2015 Regular Session of the State Legislature, mandated that the Secretary of State's office set up a FOIA database to be used to publicly report the results of FOIA requests. Upon development, the Secretary of State's Office reached out to several state agencies to test the new system.

Beginning on January 1, 2016, all governmental entities subject to the Freedom of Information Act will be required to submit FOIA requests us-



ing the new database as outlined in the West Virginia Code of State Rules 153-52.

It is the responsibility of state agency employees to enter their FOIA information into the system, in compliance with state law. The Secretary of State's Office cannot assist agencies with how to

respond or the exemptions to use with FOIA requests.

Agencies should be aware of the information required by the Secretary of State's Office.

Beginning on January 1, 2016, FOIA requests will only be accepted through online data submission. *The Secretary of State's Office will only accept hard copies if the online platform is not available which may then cause an agency to miss a deadline.*

Additionally, agencies will be required to submit a form via email to the SOS indicating the individual(s) authorized to enter information on behalf of the agency.

This form is nonspecific so agencies

Please see FOIA, Page 3

BOND REQUIREMENTS

Continued from Page 1

which should describe the original project, the amount of the original bond, and the increase amount of the cost. Additionally, the third party insurer must include the Purchasing Division's Acknowledgements form as well as the surety's Power of Attorney information page.

Please note that the name on line 22 on the Acknowledgements form must be the same as the one listed for the Power of Attorney. Any discrepancy in this information will result in the change order being rejected back to the agency for correction and may add additional time to the approval process.

The Acknowledgements form can be found on the Purchasing Division's website at www.state.wv.us/admin/purchase/forms.html under the Bond Forms link, specifically as the second page of the Performance Bond template.

Should you have any questions about this process or the required documentation, contact your Purchasing Division buyer.

FOIA

Continued from Page 2

may decide on one person or multiple people within your agency. Setting up access to use the system should be completed **prior to the January start date** through the following steps:

1. Visit <https://apps.sos.wv.gov/universalaccess/accountsetup.aspx> and create an account.
2. Complete a "FOIA db Access form."
3. E-mail the form to the Secretary of State's office at foia@wvsos.com.
4. The user will then be granted access from the information provided on the form.
5. The user will receive an email with information and directions on accessing the system.

Person(s) entering data will be required to sign in with their username and password. These credentials will track the activity of person(s) entering information for audit trail purposes.

Agencies that receive and respond to a large number of FOIA requests may utilize the bulk upload option.

The agency will be responsible for formatting the file to ensure a successful transfer. The file format for the bulk upload is available on the Secretary of State's website.

Agencies will be required to report the following information:

- Date the request was received;
- Name of the person or entity making the request;
- Subject of the request;
- Whether the request was granted or denied and the reason for any denial;
- Date of final completion of the request; and,
- Amount of any charges to the person or entity making the request.

Agencies are required to enter the information into the database by the 10th day of the month following the completion of all requests, according to *West Virginia Code of State Rules* 153-52.

Questions regarding the new FOIA database may be directed to foia@wvsos.com.

PROCUREMENT TRAINING

Continued from Page 1

were Assistant Purchasing Directors Diane Holley-Brown, Mike Sheets, and Elizabeth Perdue, and General Counsel Jimmy Meadows discussed additional information relevant to the purchasing process, including the importance of drafting clear and concise specifications, utilizing the competitive bidding process when possible, taking advantage of opportunities for training and certification, and more.

"I think it is so important for our state employees to have a good understanding of the purchasing process," Tinchler said. "We have a responsibility to our state and to our customers to provide the timely, responsive, and efficient procurement of goods and services for state government, and we strive to maintain the integrity of that process." During the second hour of the training, Travis Mulanax of the State Auditor's Office offered information on the state's Purchasing Card Program.

More than 270 individuals attended the two sessions offered during fiscal year 2015. A second session this fiscal year will be offered next spring. The online version will be posted by the end of this calendar year for state officials to view. Additional information will be shared in the *The Buyers Network*.

For more information about this training requirement,



Purchasing Division General Counsel Jimmy Meadows discusses updates to purchasing law and rule at the Purchasing Procedures and Purchasing Card Training on November 16, 2015.

please contact Administrative Services Manager Samantha Knapp at 304.558.7022 or Samantha.S.Knapp@wv.gov. You may also visit www.state.wv.us/admin/purchase/training/mandatory.html.

Agencies Required to Assemble Documents Prior to Submitting CDOs to Purchasing

To improve the turnaround time for processing Centralized Delivery Orders (CDOs) from statewide contracts, the Purchasing Division encourages state agency procurement officials to assemble pertinent documents prior to submitting the procurement to Purchasing.

This assemblage of documents creates the cover page essential for processing, which includes but is not limited to the following information: the Ship and Bill To addresses, the solicitation number from which the purchase is being made, the commodity or service being procured, and the amount of the purchase.

Agencies must also include an extended description of the procurement on the header of the document. This description may include the quantity and commodity being purchased, specific shipping or delivery instructions, and any other pertinent information the vendor or agency might need to know. For more complex purchases, this information can be included on each line. However, in no circumstance should the Extended Description field be left blank.

Buyer Supervisor Guy Nisbet said insufficient or blank extended descriptions may be subject to rejection of the document back to draft phase, requiring changes by the agency and additional time to undergo the approval process.

“Our goal is to ensure that documents are submitted to the Purchasing Division in a complete and concise manner so that we can make the process as efficient as possible, cutting down on the time required to process the transaction,” Nisbet said. Agencies may assemble the documents in any phase. For questions regarding CDOs, you may contact your Purchasing Division buyer.

Carol Jarrett Retires from Purchasing After Long Career in State Government

Carol Jarrett, an Administrative Services Assistant in the Communication and Technical Services Section of the Purchasing Division, retired after 28 years of service in state government.

Beginning her career with the state in 1987, she transferred to the Purchasing Division in 1995. She spent most of her tenure with the Purchasing Division working in the Acquisition and Contract Administration Section, but joined the Communication and Technical Services Section in 2012, working in its Communication and Professional Development Unit.

In addition to her work ethic, Jarrett’s cheerful disposition and positive attitude made working with her a pleasure. Jarrett’s years of service were celebrated during a reception at the Purchasing Division on October 29, 2015. During her retirement, she said she hopes to enjoy more baking, cooking, canning, shopping and spending time with her granddaughter, Madison.

The Purchasing Division extends its appreciation to Carol for her hard work and commitment to the organization. She will be missed by all.

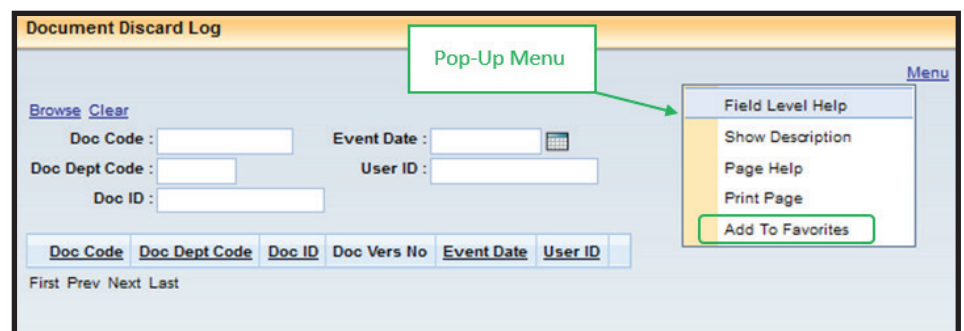


wvOASIS Tip of the Month

Occasionally, the Purchasing Division and wvOASIS Help Desk receive calls and e-mails from agency purchasers who are unable to locate a particular document. When this happens, the user is encouraged to check the **Document Discard Log** to see if the document was deleted, by whom, and when. Unfortunately, many users do not know where to find the Document Discard Log as it is not a tool used every day. So how can you ensure easy and quick access to this log? Simply add the page to your **Favorites** list.

The Favorites list enables the user to navigate quickly and easily to specific pages or documents within wvOASIS and is similar to the Favorites and Bookmark functions on your Web browser. To add the Document Discard Log to your Favorites list, follow these steps: (1) Type **DSCRDLOG** in the Jump To box and click the Go button; (2) Right click on the page, or simply click the Menu link, to open the pop-up menu; (3) Click *Add to Favorites*; and (4) Enter the applicable name, such as *Discard Log*.

Once you have created a favorite, it will be available in the left navigation panel. The Favorites list may be modified at any time by clicking the Personalize button in the upper right corner of your screen.



Purchasing Division Welcomes New Senior Buyer to Staff



Linda Harper recently joined the Purchasing Division as a Senior Buyer.

The Purchasing Division is pleased to welcome Linda Harper to the Acquisition and Contract Administration (ACA) Section. Harper joins the staff as senior buyer.

A resident of South Charleston, Harper attended West Virginia State College. She has worked in state government for nine years. Prior to joining the Purchasing Division staff, she worked at the Division of Natural Resources (DNR) as a buyer and back-up Procurement Officer. Before joining DNR, she worked in the West Virginia Office of Technology (WVOT) for seven years, and served as its designated procurement officer during her last three years at WVOT. In her spare time, Harper enjoys gardening and working in her yard.

Please welcome Linda to the Purchasing Division family!

Addenda Required to Facilitate Change in Solicitation After Issuance of Bid

During the bid process, it may be necessary to modify bid documents. To facilitate a change to a solicitation after issuance of a bid in the *West Virginia Purchasing Bulletin*, a formal written addendum is required.

The formal addendum is used to add, delete or change specifications or attachments, or to make any of change to the issued bidding documents. When an addendum to a solicitation is deemed necessary, the agency procurement officer works closely with their assigned Purchasing Division buyer. Since the Purchasing Division is responsible for processing purchases expected to exceed \$25,000, any change to a solicitation would be made in wvOASIS by the Purchasing Division.

There are several reasons why changes may be necessary to a solicitation that has been issued. Some examples of changes to solicitations, which would require an addendum, are listed below :

- Specification changes, additions, or noted deletions;

Please see **ADDENDA, Page 6**

THE BUYERS NETWORK

Purchasing Division
State Capitol Complex
2019 Washington Street, East
Charleston, WV 25305-0130
Telephone: (304) 558-2306

Earl Ray Tomblin
Governor

Jason Pizatella
Secretary
Department of Administration

David Tinchler
Director, Purchasing Division

Diane Holley-Brown
Samantha Knapp
Editors

Aimee Cantrell
Contributing Reporter

Managing Risk in Public Procurement an Effective Tool for Agency Purchasers

The West Virginia Chapter of the National Institute of Governmental Purchasing recently hosted a two-day course titled *Risk Management in Public Sector Contracting*, instructed by Certified Public Procurement Officer Mike Kolodisner. According to Kolodisner, "Risk Management is crucial to the successful outcome of any purchase and includes the determination of which aspects of a purchase might cause particular damage or harm to the public agency."

Kolodisner stated that in addition to determining these key risks, good risk management provides other benefits as well. It requires the purchaser to develop a deep knowledge and understanding of the purchase he or she is making in order to exercise the oversight that is needed.

It also requires the purchaser to work closely with others in his or her organization to identify how they might be affected by what is being procured. This sense of teamwork assists

the purchaser in understanding the impact that is made on the customers he or she serves.

Jimmy Dowden, Purchasing Specialist for the DHHR Bureau for Medical Services, said the highlight of the course for him was assessing the types and levels of risk. "Attending this course will allow me to better identify the types of risks that may impact the various procurement projects and tasks assigned to me in the future and will help me to understand how to assign severity and likelihood to each," he said. "In essence, I will be able to better prioritize the risks that may have the most impact on the projects that I'm working on."

This *Risk Management* course was deemed a success, with thirteen public procurement agents in attendance, representing five West Virginia state agencies. For questions regarding additional training opportunities through the West Virginia Chapter of NIGP, contact info@wvniigp.org.

Current Statewide Contract Update

(As of November 15, 2015)

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 www.state.wv.us/admin/purchase/swc. For more information, please contact the buyer assigned to the specific statewide contract.

Under Evaluation

<u>Contract</u>	<u>Description</u>	<u>Bid Opening</u>	<u>Status</u>
MV16	Vehicles	10/27/2015	Under Evaluation

Contract Renewals

<u>Contract</u>	<u>Vendor</u>	<u>Description</u>	<u>Dates</u>
NTIRE13A	Goodyear Tire and Rubber Co.	New Tires	11/15/2015 -11/14/2016

Contract Extensions

<u>Contract</u>	<u>Vendor</u>	<u>Description</u>	<u>Dates</u>
FASTEN12	Grayson Industries	Fasteners	10/01/2015 -09/30/16
TEMP14A	WVARF	Temporary Srvcs.	11/15/2015 -05/18/16
TEMP14B	Saunders Staffing Inc.	Temporary Srvcs.	11/15/2015 -05/18/16
TEMP14C	Adecco USA Inc.	Temporary Srvcs.	11/15/2015 -05/18/16
TEMP14D	Express Services	Temporary Srvcs.	11/15/2015 -12/31/15
TEMP14E	Manpower of WV	Temporary Srvcs.	11/15/2015 -05/18/16
TEMP14F	Choice Staffing	Temporary Srvcs.	11/15/2015 -05/18/16

Miscellaneous Actions

<u>Contract</u>	<u>Vendor</u>	<u>Commodity</u>	<u>Description of Change</u>
DFS	XPEDX LLC	Disposable Food Supplies	To cancel and reissue contract to correct wvOASIS vendor no.
VOIP13	Verizon Business Service	Voice over Internet protocol equipment	Reissue of cancelled contract VOIP13 to VOIP13A to correct FEIN and wvOASIS vendor no.

FOR MORE INFORMATION

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

<u>BUYER</u>	<u>EMAIL</u>	<u>PHONE</u>
Guy Nisbet	Guy.L.Nisbet@wv.gov	558-2596
Frank Whittaker	Frank.M.Whittaker@wv.gov	558-2316
Tara Lyle	Tara.L.Lyle@wv.gov	558-2544
Crystal Rink	Crystal.G.Rink@wv.gov	558-2402
Beth Collins	Beth.A.Collins@wv.gov	558-2157
Stephanie Gale	Stephanie.L.Gale@wv.gov	558-8801
Misty Delong	Misty.M.Delong@wv.gov	558-8802
Melissa Pettrey	Melissa.K.Pettrey@wv.gov	558-0094
April Battle	April.E.Battle@wv.gov	558-2306
Sheila Hannah	Sheila.L.Hannah@wv.gov	558-4317
Mark Atkins	Mark.A.Atkins@wv.gov	558-2307
Michelle Childers	Michelle.L.Childers@wv.gov	558-2063
Dustin Spry	Dustin.W.Spry@wv.gov	558-0246
Linda Harper	Linda.B.Harper@wv.gov	558-0468

ADDENDA

Continued from Page 5

- Adding the pre-bid attendee list;
- Extending or altering the bid schedule dates and times;
- Attaching the listing of technical questions from vendors with a corresponding answer; and/or
- Revised or added sketches, drawings and/or charts.

Upon receipt, review and approval, the Purchasing Division will issue the addendum and distribute to all known bidders (i.e. those attending the pre-bid meeting, receiving bid packages, suggested vendors, etc.). Addenda are available to view in the *West Virginia Purchasing Bulletin*.

Sufficient processing time is necessary in advance of the scheduled bid opening to ensure that potential bidders are informed of any changes to the solicitation. Therefore, agency procurement officers need to communicate any changes to their Purchasing Division buyers as quickly as possible. The Purchasing Division may, at its discretion, extend the bid opening date if it deems to be in the best interest of the state.

For more information on addenda, view Section 6.2.9 of the *Purchasing Division Procedures Handbook*.