

THE BUYERS NETWORK

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of Administration to Promote
Better Value in Public Purchasing

Head House Restoration Makes Good Impression on B&O Rail Passengers

Thomas Jefferson wrote in *Notes on the State of Virginia*, published in 1785, that "... the passage of the Potomac through the Blue Ridge is perhaps one of the most stupendous scenes in Nature." It's a view many residents and visitors to Harpers Ferry have access to thanks to the Baltimore and Ohio (B&O) Railroad. The Purchasing Division recently helped the State Rail Authority secure the vendor to make much-needed repairs at the station.

A head house, also known as a station building, is the main building of a passenger railway station. It is typically used to provide services to passengers, such as ticket counters or machines, waiting areas with seats and luggage stands, and offices for staff.

The two head houses at the historic B&O Railroad Station in Harpers Ferry are part of a recognized, highly visible and significant historic building complex. The Railroad Station is one of the most culturally and historically significant landmarks in the nation. It gains part of its cultural importance from the integrity of its architectural components, materials and surfaces, and from the character of its spaces throughout the interior and exterior of the buildings and on the surrounding site.

Amtrac Railroad Contractors of Hagerstown, Maryland, was awarded the contract to repair both head houses after the



While the B&O Railroad is historic, Harpers Ferry visitors and residents now have a new head house. This location will be used to provide such services as ticketing and a waiting area. The Purchasing Division is pleased to have assisted the State Rail Authority on this unique purchase.

Purchasing Division solicited bids for the project, valued at more than half a million dollars. The project included repairs to the concrete foundation and floor slab, framing, and a new metal roof and guttering installation in the North Head House, as well as repairs to the siding, doors and windows, and painting of both head houses.

The Purchasing Division is pleased to showcase this as one of the many unique projects processed through its central office.

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Headquarters Account in VCUST Table within wvOASIS Used when Duplicate Vendor Accounts Exist

Following the implementation of wvOASIS in 2014, resulting duplicate vendor/customer accounts have created some confusion when attempting to identify the appropriate account for a vendor during procurement transactions.

To mitigate this confusion, the Department of Administration is using a "Headquarters Account" strategy to streamline the data to make it easier for procurement officials to find the correct vendor to use

for an agency's transactions.

The VCUST table is made up of vendor data from multiple state systems used before the implementation of wvOASIS, including the Purchasing Division's TEAM Purchasing System; the Finance Division's Financial Information Management System (i.e. WVFIMS); and the State Auditor's Office's P-Card Vendor File.

Please see **VENDOR**, page 4

THE DIRECTOR'S COMMENTS

Change Brings Opportunity at the Purchasing Division

By Purchasing Director Dave Tincher

Over the last few months, the Purchasing Division has experienced change. Change to its personnel and organizational structure. Change to the **Purchasing Division Procedures Handbook**. Even change to its method of training delivery. Socrates once said, "The secret of change is to focus all of your energy not on fighting the old, but on building the new."

Change is often hard. The unknown can be scary and intimidating. But change can also be positive.

Because of some of the recent changes experienced in our office, we have revised our organization chart, specifically the Acquisition and Contract Administration (ACA) section. Several months ago, Frank Whittaker was promoted to Assistant Director of ACA following Mike Sheets' transition into his new role as Deputy Director.

This change led to an opening for a buyer supervisor position, which was also filled internally. A retirement late last year also allowed us to fill a Purchas-

ing Assistant position (see Page 4).

We are pleased to share with our state agency partners the Purchasing Division buyer supervisors and their new teams (see article below). The changes in staff have resulted in some minor changes to agency assignments, so we ask for your patience and participation in building these new relationships moving forward.

The **Purchasing Division Procedures Handbook** was also updated in late February. Specifically, language relating to Sections 4 and 6 was modified to clarify and outline pertinent processes related to vendor registration and administrative changes to contracts. Additionally, we made a slight change to the change order language incorporated in Appendix K. For more on these Handbook updates, see Page 4.

Lastly, the Purchasing Division has been placing great emphasis on updating its agency online resource modules. In addition to ensuring all training content is current and accurate, our modules are experiencing a substantial makeover. The old module format strictly utilized a PowerPoint with audio overlay. The new format allows the user to interact with the content throughout the module. The revised Fixed Assets and Surplus Property and Change Orders and Addenda modules were recently published on the Purchasing Division's website. Keep checking as more updated modules will follow in the coming months!

As we move into spring, let's make the most of the change happening all around us. Change is an opportunity we must embrace, as with change comes growth.



Purchasing Organization Structure Changes

Over the last several months, the West Virginia Purchasing Division has experienced some personnel changes, including the promotion of two staff members to assistant director and buyer supervisor, as well as the addition of a purchasing assistant. In response to these changes, the Purchasing Division made recent modifications to its organizational structure, specifically that of the Acquisition and Contract Administration (ACA) section. Below is the updated list of ACA buyer supervisors and their team members.

Supervisor: Tara Lyle

Senior Buyers: April Battle, Charles Barnette, Mark Atkins
Purchasing Assistant: Millicent Mann

Supervisor: Guy Nisbet

Senior Buyers: Jessica S. Chambers, Melissa Pettrey, Brit-tany Ingraham, Michelle Childers
Purchasing Assistant: Katrina Dufourny

Supervisor: Linda Harper

Senior Buyers: Crystal Rink, Stephanie Gale
Purchasing Assistant: Jessica Riley



The three buyer supervisors of the Acquisition and Contract Administration section are shown here, from left to right: Linda Harper, Guy Nisbet, and Tara Lyle.

An updated organization chart is available on the Purchasing Division's website at www.state.wv.us/admin/purchase/orgchart.pdf. Additional contact information for Purchasing Division employees can be found at www.state.wv.us/admin/purchase/directory.html.

2017 Agency Purchasing Conference Schedule Announced

Planning is underway for the 2017 Agency Purchasing Conference. Following last year's conference, more than 95% of attendees rated the "Time of Year" for the conference as "Excellent" and "Good." As a result, the Purchasing Division is pleased to bring back the conference in late August this year!

Scheduled for August 22-25, 2017, at Canaan Valley Resort and Conference Center, this three-day training opportunity will provide attendees with a closer look at the state purchasing process as well as offer ample time for peer networking. Details are available at www.state.wv.us/admin/purchase/Conference/Agency/2017/default.html.

Registration is set to open in mid-June. Attendees will not be able to make lodging reservations at Canaan Valley Resort until that time. Conference registration and lodging reservations will be given on a first-come, first-served basis. Please note that registration for lodging and conference are separate processes and that registering for the conference does not guarantee a lodging room. Individuals must complete the online registration form and then contact Canaan Valley Resort directly to reserve their room.

Additional lodging will be available at Blackwater Lodge by calling 304.259.5216. Conference participants should indicate that they are attending the 2017 Agency Purchasing Conference when making their reservation to receive the contracted room rate.

This year, the conference agenda will again offer a Beginner's Track for individuals with two years or less experience in the public procurement process and an Advanced Track for those individuals who have been designated as his or her agency's primary or backup designated procurement officer.

In addition, the agenda will include four new topics this year: *Legislative Updates*, *Risks in Public Procurement*, *Electronic Business in West Virginia*, and *Business Intelligence*. Furthermore, a self-led Certification Study Group will be offered for the second year to agency purchasing personnel wishing to participate in the West Virginia Procurement Certification Program.

Buyers Network

<i>*ROOMS FOR EACH SESSION HAVE NOT BEEN ASSIGNED; THIS AGENDA IS FOR PLANNING PURPOSES ONLY*</i>					
Conference Grid	TBD	TBD	TBD	TBD	TBD
Tuesday, August 22					
Conference Registration 1:00pm - 6:00pm	Registration will be held in the Aspen Room				
Newcomers' Orientation 4:00pm - 4:30pm	This event will be held in the Willow and Elm Room				
Agency Meetings 1:00pm - 6:00pm	Agencies requesting to conduct an agency meeting prior to the conference will utilize this time slot and be designated a meeting space				
Evening Social 7:00pm - 8:30pm	This event will be held in the Maple Room and the adjoining Laurel Lounge Light appetizers and beverages will be available				
Wednesday, August 23					
Group Breakfast 7:00am - 9:00am	Breakfast will be held in the Spruce, Balsam, and Maple Room				
Conference Registration 7:30am - 9:00am	Registration will be held in the Aspen Room				
Commencement 9:00am - 9:45am	This event will be held in the Spruce, Balsam, and Maple Room <i>Beginner's Track Advanced Track</i>				
Workshops 10:00am - 11:00am	<i>Public Procurement Basics</i>	<i>Risks in Public Procurement</i>	<i>Surplus Property/Fixed Assets</i>	<i>Inspection Services</i>	<i>Correctional Industries</i>
Workshops 11:15am - 12:15pm	<i>Transparency and Resources</i>	<i>Purchasing Forum</i>	<i>Request for Quotations</i>	<i>Technical Purchases</i>	<i>Special Purchases</i>
Group Lunch 12:15pm - 1:45pm	Lunch will be held in the Spruce, Balsam, and Maple Rooms				
Workshops 1:45pm - 2:45pm	<i>Statewide Contracts</i>	<i>Purchasing Ethics</i>	<i>Preparing RFPs</i>	<i>Evaluation to Award</i>	<i>Vendor Registration</i>
Workshops 3:00pm - 4:00pm	<i>Developing Specifications</i>	<i>Roundtable Discussions</i>	<i>Electronic Business with WV</i>	<i>Change Orders & Addenda</i>	<i>Statewide Contracts</i>
Banquet & Entertainment 6:00pm - 8:00pm					
Thursday, August 24					
Group Breakfast 7:00am - 8:45am	Breakfast will be held in the Spruce, Balsam, and Maple Room				
Workshops 8:45am - 9:45am	<i>Request for Quotations</i>	<i>Surplus Property/Fixed Assets</i>	<i>Preparing RFPs</i>	<i>Risks in Public Procurement</i>	<i>Certification Study Group</i>
Workshops 10:00am - 11:00am	<i>Evaluation to Award</i>	<i>Business Intelligence</i>	<i>Evaluating RFPs</i>	<i>Construction Purchases</i>	<i>Developing Specifications</i>
Workshops 11:15am - 12:15pm	<i>Vendor Registration</i>	<i>wvOASIS Procurement</i>	<i>Purchasing Card Program</i>	<i>Expressions of Interest</i>	<i>Correctional Industries</i>
Group Lunch & Awards 12:15pm - 2:00pm	Lunch will be held in the Spruce, Balsam, and Maple Room				
Workshops 2:00pm - 3:00pm	<i>Purchasing Inspections</i>	<i>Request for Quotations</i>	<i>Travel Management</i>	<i>Legislative Updates</i>	<i>Statewide Contracts</i>
Dinner on your own					
Friday, August 25					
Breakfast on your own					
Workshops 8:30am - 9:30am	<i>Business Intelligence</i>	<i>Purchasing Card Program</i>	<i>Change Orders & Addenda</i>	<i>Technical Purchases</i>	<i>Developing Specifications</i>
Workshops 9:45am - 10:45am	<i>wvOASIS Procurement</i>	<i>Electronic Business with WV</i>	<i>Evaluating RFPs</i>	<i>Purchasing Card Program</i>	<i>Legislative Updates</i>
Workshops 11:00am - 12:00pm	<i>Purchasing Ethics</i>	<i>Special Purchases</i>	<i>Construction Purchases</i>	<i>Travel Management</i>	<i>Evaluation to Award</i>

Rev. 02/14/2017

Please note that any procurement officer whose basic or advanced certification is expected to expire within the next year is required to attend this year's conference if that individual only participated in one of the last two Agency Purchasing Conferences. For information regarding this re-certification requirement, please see the re-certification guidelines on the Purchasing Division's website at www.state.wv.us/admin/purchase/trainingcertification or contact Administrative Services Manager Samantha Knapp at 304.558.7022 or Samantha.S.Knapp@wv.gov. More details on registration and lodging will be shared on the Purchasing Division's conference website as it becomes available.

Purchasing Welcomes Our New Employee to the ACA Section



Millicent Mann
Purchasing Assistant

The Purchasing Division is pleased to welcome Millicent Mann to its Acquisition and Contract Administration (ACA) section. Mann joins the staff as a purchasing assistant.

A resident of Teays Valley, Mann previously worked for more than seven years with the Baltimore City Police Department in records management and for the nonprofit SNV, which promotes sustainable development in countries worldwide.

Mann currently holds an associate's degree in forensic science from Northern Virginia College and is working on a bachelor's degree in criminal justice from the University of Maryland. In her free time, Mann enjoys painting, pottery, hiking and spending times outdoors.

Purchasing welcomes Millicent to the family!

Revised Purchasing Division Handbook Now Online

The West Virginia Purchasing Division revised its *Purchasing Division Procedures Handbook*, effective February 22, 2017. The updated Handbook can be accessed online at www.state.wv.us/admin/purchase/Handbook.

Below is a summary of some of the changes made during this recent revision:

- Changes to Section 4 address requirements established for vendors who wish to do business with the state of West Virginia and the scope of the vendor registration program administered by the West Virginia Purchasing Division. More specifically, changes are outlined that relate to vendors who have been declared as meeting one of the categories for fee exemption and the process agency procurement officers must follow to properly note that particular exemption in the award document.
- Also, changes made to this section address multiple vendor/customer records for the same vendor/customer in the VCUST table. The Purchasing Division stresses to agencies to use the vendor/customer record designated as the "Headquarters" account when processing a procurement transaction. To avoid multiple records for a particular vendor, agency procurement officers should ensure that vendors are not already registered with the Purchasing Division.
- Revised language in Section 6 of the Handbook relating to the pre-approval of the Purchasing Division before administrative changes to contracts can be made.
- The words "No other changes" have been added to the change order language included in Appendix K. This language should be entered into the wvOASIS Extended Description field when issuing a change order.

Please note that all archived versions of the *Purchasing Division Procedures Handbook* are available on the Purchasing Division's website. To view the email that included the specific changes to this version that was distributed to agency designated procurement officers, please visit the archive email notifications at <http://intranet.state.wv.us/admin/purchase/eArchive.html>. The Purchasing Division continues its commitment to making positive improvements to its processes in compliance with state law and rule.

VENDOR

Continued from Page 1

The term "Headquarters" does not refer to the vendor's corporate structure, but rather is used as a system identifier for the entity's primary vendor/customer account in VCUST. For every vendor account in VCUST, agencies should check the "Headquarters" tab to see if the record is the company's Headquarters Account, as this is the account that should be used by state agencies in their procurement transactions.

In addition, agencies are encouraged to verify vendor records by the Federal Employer Identification Number (FEIN) early on in the procurement process rather than just by Legal Name. This practice will allow the agency to accurately determine the FEIN or Social Security Number (SS#) under which the vendor is currently doing business rather than select a vendor account with an outdated FEIN/SS#, under which the vendor was formerly doing business. When searching for a vendor based on its legal name, agencies should use the "wildcard" (*) as much as possible, such as between initials. For example, an agency may find just one or two listings by searching for *JP Morgan*, whereas they may find four or five listings under *J*P*Morgan*.

If multiple accounts are found under the same FEIN with different variations/abbreviations of the company name, then only the Headquarters Account should be utilized as the other accounts are considered duplicate accounts and may have been rendered "Inactive" or placed on "Discontinue - No New Business" status. The exception would be if the vendor is doing business under another name (e.g. such as a DBA with the same FEIN) other than the Legal Name (i.e. Headquarters Account). These remain "Active" or not discontinued.

If an ordering address is listed on a duplicate account and not the Headquarters Account, the agency should create a Vendor/Customer Modification (VCM) document to add the needed address to the Headquarters Account.

For more information on identifying duplicate accounts, review the related resources at <http://intranet.state.wv.us/admin/purchase/VendorReg.html>. Additional questions may be submitted by email to Purchasing.VendorRegistration@wv.gov.

wvOASIS Reminds Agency Procurement Officers of Minimum Accounting Requirements for CRQM and ARQM Documents

At the 2016 Agency Purchasing Conference, wvOASIS staff shared with state agency purchasers information related to the minimum accounting requirements for CRQM and ARQM documents.

Respectively, these documents serve as the centralized and decentralized requisitions for master agreements (i.e. open-end contracts). Therefore, only the General Information tab is required on the accounting lines for these solicitation types.

When completing the accounting lines in a CRQM or ARQM, agency purchasers should use the Event Type PR01 and select Yes in the Reserved Funding field, allow the current and budget fiscal years to be inferred, and leave the Fund Accounting and Detailed Accounting tabs blank.

Following these instructions should save purchasers time and keystrokes when creating CRQM and ARQM documents.

The screenshot displays the 'Accounting Line' entry interface. At the top, it shows 'Accounting Line: 1' with 'Line Amount: \$10,000.00' and 'Line Open Amount: \$10,000.00'. Below this is a table with columns: 'Accounting Line', 'Line Amount', 'Line Open Amount', 'Line Closed Amount', 'Referenced Line Amount', 'Event Type', 'Non-Reserved Funding Open Amount', and 'Reserve'. The first row contains the values: '\$10,000.00', '\$10,000.00', '\$0.00', '\$0.00', 'PR01', and '0.00 Yes'. A 'Total: 1' is shown at the bottom left. The 'Information' tab is active, showing 'Event Type: PR01', 'Posting Pair: A', 'Accounting Template: [empty]', and 'Line Description: PR01 non-accounting event type does not encumber funds. Current BFY will be inferred.' To the right, 'Budget FY:', 'Fiscal Year:', and 'Period:' fields are present. Below the description, 'Non-Reserved Funding Open Amount: 0.00', 'Line Closed Amount: \$0.00', 'Line Closed Date:', 'Line Open Amount: \$10,000.00', and 'Referenced Line Amount: \$0.00' are displayed. At the bottom, 'Line Amount: \$10,000.00' is entered, and 'Reserved Funding: Yes' is selected in a dropdown menu. A red arrow points to the 'Line Amount' field.

Updated Instructions Now Available for the INDEQP Statewide Contract

The Purchasing Division has published revised viewing instructions for contract pricing related to the statewide contract for industrial supplies and equipment (i.e. INDEQP). State agency purchasers may view this contract, PBKINDEQ11, online at www.state.wv.us/admin/purchase/swc/INDEQP.htm. This contract is awarded to W.W. Grainger Incorporated.

The new procedures for viewing prices on this contract are as follows:

1. Visit the company's website at www.grainger.com
2. Click "Sign In" located at the top right of the page
3. In the sign-in box, use the following username and password:
User Id: access#1
Password: wvcode11
4. Search for items on the site, as applicable

THE BUYERS NETWORK

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Purchasing Division Recognizes its Latest Basic Certification Recipient

The Purchasing Division is pleased to announce J.H. "Jamie" Adkins is the latest recipient in its West Virginia Procurement: Basic Certification Program.

Adkins, a Procurement Manager for the Division of Natural Resources, has worked for the state for 14 years. When asked about his certification experience, he stressed the importance of the program and said he encourages others to take the necessary steps for certification.

"Preparing for and obtaining certification validates your purchasing knowledge and experience," Adkins said. "It's a great way to refresh and reinforce your under-

standing of the guidelines and processes."

State agency procurement officers interested in participating in the basic and/or advanced certification program may review the requirements at www.state.wv.us/admin/purchase/training/Certification. Questions regarding the certification program may be directed to Communication and Professional Development Manager Samantha Knapp at Samantha.S.Knapp@wv.gov or 304.558.7022.

The Purchasing Division would like to congratulate Adkins on this noteworthy accomplishment!

Purchasing Division Monitors Vendor Complaint Forms

Ensuring that vendors meet the specified requirements of a contract after its award is crucial to the state purchasing process. When agreed-upon deliverables to agencies do not meet specifications, state agency designated procurement officers are strongly encouraged to contact the vendor and voice their concerns.

Agency procurement officers must document all efforts made to resolve the problem. Complaints should be resolved expeditiously and courteously. It is the responsibility of the agency procurement officer to initiate all efforts to attempt to resolve the matter and to document his or her actions. However, state agency purchasers are not alone when ensuring vendors deliver commodities and services as contracted.

After all attempts have failed by the agency to resolve the issues, the complaint should immediately be documented in a *Vendor Performance Report* (WV-82), along with documentation noting all previous steps taken to try to resolve the problem. This information, along with all written vendor responses, must be submitted to the Purchasing Division buyer who is assigned to that agency.

The *Vendor Performance Report* should be used to document all circumstances of vendor performance, both positive and negative, even if a resolution has been reached. The Purchasing Division maintains a central file of all submitted reports, administered by Quality Control and Transparency Specialist Lu Anne Cottrill, to ensure a statewide, comprehensive view of the vendor's performance. When assistance is requested, a Purchasing Division official will review the actions taken and assist in resolving the matter.

Latest Issue of Property Connection Now Online

The first quarter issue of *The Property Connection*, produced by the West Virginia State Agency for Surplus Property (WVSASP), is now available online at www.state.wv.us/admin/purchase/surplus/propertyconnection.

WVSASP publishes this quarterly newsletter to focus on procedural updates, inventory changes, general news and stories highlighting eligible organizations and how they have benefited from their purchases.

Articles published in the current issue feature West Virginia Voluntary Organizations Active in Disaster, which recently purchased furniture from WVSASP to furnish a new office for 24 individuals; a look at WVSASP's new branding initiatives; and information on House Bill 2819, which would terminate the WVSASP.

To view the latest newsletter or for more WVSASP news and updates, visit WVSurplus.gov or call 304.766.2626.



Current Statewide Contract Update

(As of March 13, 2017)

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.

Contract Renewals

Contract	Vendor	Commodity	Effective Date
PBKINDEQ11	Grainger	Geo. Information Systems	02/03/15 -02/02/18

Miscellaneous Actions

Contract	Vendor	Commodity	Description of Change
FASTEN16	Grayson Industries Inc.	Misc. Fasteners	Updated Code Information
SWC*28	Aarons Business Solutions	Photocopiers	To Cancel the contract

FOR MORE INFORMATION

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

BUYER	E-MAIL	PHONE
Supervisors		
Tara Lyle	Tara.L.Lyle@wv.gov	558-2544
Guy Nisbet	Guy.L.Nisbet@wv.gov	558-2596
Linda Harper	Linda.B.Harper@wv.gov	558-0468
Senior Buyers		
Mark Atkins	Mark.A.Atkins@wv.gov	558-2307
Charles Barnette	Charles.D.Barnette@wv.gov	558-2566
April Battle	April.E.Battle@wv.gov	558-0067
Jessica Chambers	Jessica.S.Chambers@wv.gov	558-0246
Michelle Childers	Michelle.L.Childers@wv.gov	558-2063
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Brittany Ingraham	Brittany.E.Ingraham@wv.gov	558-2157
Melissa Pettrey	Melissa.K.Pettrey@wv.gov	558-0094
Crystal Rink	Crystal.G.Rink@wv.gov	558-2402