

THE BUYERS NETWORK

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THE BUYERS NETWORK

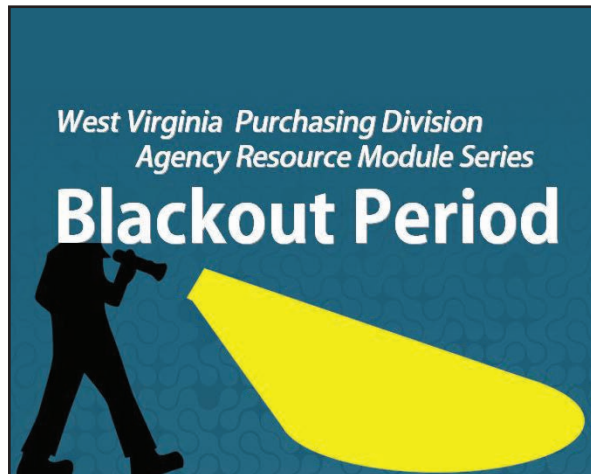
is Published Monthly
by the Purchasing Division
of the West Virginia Department
of Administration to Promote
Better Value in Public Purchasing

Blackout Period Training Module Added to Website

The Purchasing Division is pleased to announce that it has published its first "mini" agency resource module on its website. The new module, which focuses on the blackout period, offers .25 hours of procurement training credit.

The blackout period occurs from the time a requisition is submitted to the Purchasing Division for public advertisement until an award is made. During this time, evaluators and agency personnel are not permitted to communicate with vendors about the solicitation or any component of it without prior approval from the Purchasing Division. All communication regarding the solicitation must be directed to the Purchasing Division buyer until an award has been made.

This module is one of twelve online agency resource modules posted on the Purchasing Division's website. These modules are designed to allow agency procurement personnel to receive training at the convenience of their offices. Upon viewing each module, the



In an effort to provide more training, the Purchasing Division is developing a series of "mini" online training modules. The first module in this new series focuses on the blackout period. Participants can earn .25 hours of credit for viewing this module.

agency purchaser must print the *Certificate of Completion* for the specific module and submit it to the Purchasing Division to receive credit. The certificate must be signed by the employee and his or her supervisor and sent to the Purchasing Division's training unit at Purchasing.Training@wv.gov.

Questions regarding this module may also be sent to the aforementioned email. All online agency resource modules can be found at www.state.wv.us/admin/purchase/training/modules.html.

INSIDE...

- **Director's Comments:**
Purchasing Utilizes a Multitude of Platforms to Share Pertinent Information with its Customers
- Purchasing Division Announces 2018 Training Schedule, Change in Registration Process
- Purchasing Division Training Now Qualifies for CPEs

Delivery Orders Assist Agencies and Purchasing to Track Spend

When ordering from a statewide contract, it is important to complete the appropriate Delivery Order, either a Central Delivery Order (CDO) or Agency Delivery Order (ADO) respectively, depending on the ordering instructions. At the agency level, processing an ADO helps agencies track spend while allowing the Purchasing Division to monitor which statewide contracts are being used.

Statewide contracts are mandatory for agencies to use when purchasing frequently bought items at a uniform price. These prices are constant throughout the state. When agencies order from a contract, that order is not properly recorded in *wvOASIS* unless a Delivery Order is processed. While a Delivery Order may be perceived as an added step, it is a critical part of the purchasing process.

Please see **Delivery Order**, page 5

SAVE THE DATE: 2018 PURCHASING CONFERENCE - OCT. 2-5

DIRECTOR'S COMMENTS

Purchasing Utilizes a Multitude of Platforms to Share Pertinent Information with its Customers

By Purchasing Director Mike Sheets

The Purchasing Division has been hard at work planning, developing, and maintaining its programs and services to ensure that our agency and local government partners, as well as the vendor community, receive accurate and complete information at all times.

From scheduling our 2018 Agency Purchasing Conference (save the date for October 2-5, 2018!) and preparing the 2018 In-House Training Program schedule (see page 3) to conducting and planning future seminars (see page 4) around the state for our local government entities and current and prospective vendors, the Purchasing Division understands the importance of communicating the most up-to-date information to those we serve and utilizing a variety of platforms to do so. While face-to-face events offer the benefit of direct conversation, this isn't the only outlet through which we share information with our customers.

The Purchasing Division also utilizes a combination of online offerings, including notices to our agency partners via email, and this very newsletter, *The Buyers Network*, to share pertinent information. One of the things we try to do through our newsletter is to clarify processes and procedures for our agencies when we see a trend that may suggest a lack of understanding.

In this issue, we have made clarifications regarding the **Disclosure of Interested Parties** process (see below) and the use of Agency Delivery Orders when processing a transaction against a statewide contract (page 1).

As part of our ongoing efforts, we have also made some changes and improvements to the way we conduct business. Agency employees must now register for our In-House Training workshops and webinars through CourseMill, the state's online learning management system. This will allow individuals to print their own Certificates of Completion and track their training attendance. Additionally, Certified Public Accountants may receive continuing education credits through the West Virginia Board of Accountancy for their attendance and participation in any approved in-person trainings offered by the Purchasing Division (see page 5).

With the constant flow of information, we realize that content can sometimes get lost in the shuffle. To assist our agency partners in staying on top of this information, we post all emails sent to our agency designated procurement officers to our intranet at <http://intranet.state.wv.us/admin/purchase/eArchive.html>.

We will continue to do our best to inform and provide educational and informational offerings that meet the needs of all our customers. We welcome your feedback on how we're doing and suggestions on what we can do better.

Happy holidays and we look forward to seeing you in the new year!



Purchasing Division Provides Clarification on Disclosure of Interested Parties Process

Now that the **Disclosure of Interested Parties** form has been in effect for the last several months, the Purchasing Division would like to provide some clarification on its usage.

In accordance with *West Virginia Code* §6D-1-2, state agencies may not enter into a contract, or a series of related contracts, that has/have an actual or estimated value of \$100,000 or more until the business entity submits to the contracting state agency its disclosure of interested parties to the applicable contract. In addition, the business entity awarded a contract is obligated to submit a supplemental **Disclosure of Interested Parties** form reflecting any new or differing interested parties to the contract within 30 days following the completion or termination of the applicable contract.

Since this law went into effect July 7, 2017, some questions have arisen regarding the use of this form. State law requires that all new contracts that are expected to exceed \$100,000 will be required to have this form prior to award. The Purchasing

Division will handle acquiring and submitting the form at the time of award due to the blackout period in which agencies are not authorized to communicate with vendors bidding on the particular contract.

The Purchasing Division will also require this form for all open-end contracts (i.e. Central Master Agreements) since the expected spend is uncertain at the time of award. The **Disclosure of Interested Parties** form is included in all solicitation packages in an attempt to save time by allowing the vendor to receive the form in advance.

This form will not be required when processing renewals of contracts.

At the end of the contract period, the agency will be the responsible party to obtain the form and submit it to the Ethics Commission. To view or download the **Disclosure of Interested Parties** form, please visit: www.state.wv.us/admin/purchase/VRC/Ethics_DisclosureInterestedParties_2017.pdf.

Purchasing Division Announces 2018 Training Schedule, Change in Registration Process

The Purchasing Division is pleased to release its 2018 In-House Training Program and webinar schedule and announce a change in its registration process. Participants must now register for each class and webinar via CourseMill, the state's learning management system. CourseMill will allow individuals to print certificates of completion for each session completed and keep track of their training participation.

The 2018 schedule features multiple

multi-hour sessions offered at the Purchasing Division, which is in Building 15 of the state Capitol complex, as well as eleven webinars for the year, an increase of five over last year's offerings. There are also two day-long seminars offered in March and July, which will take place at the West Virginia State Training Center (Building 7), also located at the state Capitol complex.

New to the schedule this year is a session titled *Purchasing Ethics, Risks, and Com-*

mon Pitfalls, which offers guidance on how agencies can better manage their solicitations from beginning to end while reducing risk and ensuring compliance with the laws, rules, and procedures. This workshop will also identify the top ten common pitfalls in the public procurement process as seen by the West Virginia Purchasing Division.

This year's schedule also includes a 90-minute certification study group offered in January. Anyone interested in obtaining their state procurement certification is encouraged to attend.

No training session will be offered in September due to preparations for the annual Agency Purchasing Conference, which is scheduled for October. Registration is limited and will be given on a first-come, first-served basis.

To register for these training sessions, visit www.onlinelearning.wv.gov and log in with your User ID (e.g. your A, B, or E number) and password. Once logged in, click on the Course Catalog tab and search for the courses that begin with the "PUR" ID, or simply type the Catalog ID for the course you're interested in into the Catalog ID field.

If you have not logged into CourseMill previously, your password should be "password." You will be prompted to change it once logging in. If you can't remember your password, simply click on the "Forgot your User ID or Password?" button and you will receive an email to reset your password.

If you continue to experience issues logging in, contact Samantha Knapp at 304.558.7022.

Questions regarding the In-House Training Program may be sent to Purchasing.Training@wv.gov or directed to Courtney Sisk Johnson at 304.558.4213.

2018 West Virginia Purchasing Division Training Schedule					
2018 Dates	Workshop Title	CourseMill Catalog ID	Time	Method	Approved CPEs
January 10	Public Procurement Basics & Tools/Resources	PUR112W	9 a.m. – 11 a.m.	Webinar	N/A
January 24	Technical & Special Purchases	PUR204	9 a.m. – 11 a.m.	In-House	2 CPE Hours
January 31	Certification Study Group	PUR301	10 a.m. – 11:30 a.m.	In-House	1.5 CPE Hours
February 14	Statewide Contracts	PUR109W	10 a.m. – 11 a.m.	Webinar	N/A
February 28	Preparing & Evaluating RFPs	PUR303	9 a.m. – 12 p.m.	In-House	3 CPE Hours
March 7	Fixed Assets and Surplus Property	PUR110W	10 a.m. – 11:30 a.m.	Webinar	N/A
March 21	An Introduction to West Virginia Purchasing	PUR102	9 a.m. – 4 p.m.	In-House	6.5 CPE Hours
March 28	wvOASIS Procurement	PUR208	9 a.m. – 11 a.m.	In-House	2 CPE Hours
April 11	EOIs & Construction Purchases	PUR302	9 a.m. – 11 a.m.	In-House	2 CPE Hours
April 18	Travel Management	PUR205W	10 a.m. – 11:30 a.m.	Webinar	N/A
April 25	Purchasing Ethics, Risks, & Common Pitfalls	PUR211	9 a.m. – 12 p.m.	In-House	3 CPE Hours
May 16	Solicitation Process: From Pre-Planning to Post Award	PUR202W	9 a.m. – 12 p.m.	Webinar	N/A
May 23	Inspection Services & Statewide Contracts	PUR114	9 a.m. – 11 a.m.	In-House	2 CPE Hours
June 6	Preparing & Evaluating RFPs	PUR303	9 a.m. – 12 p.m.	In-House	3 CPE Hours
June 13	Purchasing as a Privacy Power House	PUR201W	10 a.m. – 11:30 a.m.	Webinar	N/A
June 27	Fixed Assets and Surplus Property	PUR110	10 a.m. – 11:30 a.m.	In-House	1 CPE Hour
July 11	An Introduction to West Virginia Purchasing	PUR102	9 a.m. – 4 p.m.	In-House	6.5 CPE Hours
July 18	Electronic Business with West Virginia	PUR105	10 a.m. – 11:30 a.m.	In-House	1 CPE Hour
August 1	Travel Management	PUR205	10 a.m. – 11:30 a.m.	In-House	1.5 CPE Hours
August 15	wvOASIS Procurement	PUR208W	9 a.m. – 11 a.m.	Webinar	N/A
August 29	Solicitation Process: From Pre-Planning to Post Award	PUR202	9 a.m. – 12 p.m.	In-House	3 CPE Hours
<i>There will be no trainings in September due to conference prep</i>					
October 24	Technical & Special Purchases	PUR204	9 a.m. – 11 a.m.	In-House	2 CPE Hours
October 31	EOIs & Construction Purchases	PUR302	9 a.m. – 11 a.m.	In-House	2 CPE Hours
November 14	Developing Specifications & Contracting	PUR113W	9 a.m. – 11 a.m.	Webinar	N/A
November 28	Purchasing Ethics & Risks	PUR210W	9 a.m. – 11 a.m.	Webinar	N/A
December 5	Vendor Registration	PUR111W	9:30 a.m. – 12 p.m.	Webinar	N/A
December 12	Inspection Services	PUR107W	10 a.m. – 11 a.m.	Webinar	N/A

Purchasing's Local Government and Vendor Seminars a Success, New Dates Added for December

During the months of October and November, the Purchasing Division hit the road to present information to local government entities and vendors. These educational seminars provided an overview of programs and services offered by the Division. Survey results from these seminars can be found in the box below.

Following the success of these two events, the Purchasing Division is pleased to announce it will host seminars in **Martinsburg on December 19, 2017**, and **Moorefield on December 20, 2017**. On both dates, local government entities are invited to attend from 10 a.m. to 12 p.m. while current and prospective vendors are welcome to attend from 1:30 p.m. to 3:30 p.m. For more information, visit www.state.wv.us/admin/purchase/LocalGovt/LocalsFlier.pdf and www.state.wv.us/admin/purchase/VendorFlier.pdf.



Purchasing Director Mike Sheets joined other staff members at seminars in Beckley and Clarksburg in October and November targeting local government officials and vendors. Survey results from these events showed strong support for continuing them throughout 2018.

The survey results from the local government seminar revealed that:

- 93% strongly agreed they would encourage other local entities to attend a similar seminar;
- 83% strongly agreed their local entities would be able to utilize the information covered during the seminar; and,
- 80% strongly agreed they better understand the services offered by the West Virginia State Agency for Surplus Property.

The survey results from the vendor seminar revealed that:

- 100% strongly agreed they better understand the types of procurement methods utilized by the Purchasing Division;
- 100% strongly agree they know where to go online to review active solicitations;
- 100% strongly agree they would encourage other business owners to attend a similar seminar.

Purchasing Recognizes Latest Basic Certification Recipient

The Purchasing Division is pleased to announce Theresa Dorsey as the latest recipient in its West Virginia Procurement: Basic Certification program.

Dorsey, a purchasing assistant for the Department of Health and Human Resources, has worked for the state for more than four years.

"It was great to get a comprehensive view of the process and put faces with names as I went through the training," Dorsey said. "I hadn't taken a test in years but they did a great job of providing a good framework for study. I'm glad I was able to take part in the process."

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 the Purchasing Division's training unit at Purchasing.Training@wv.gov or by contacting Samantha Knapp at 304.558.7022.

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

Mandatory High-Level Officials Training Now Online

Nearly 100 of the state's high-level officials participated in the Purchasing Procedures and Purchasing Card training held via webinar in November. For anyone who missed it, the recording is now available online. The next webinar will be conducted in May of 2018.

Co-presented bi-annually by the West Virginia Purchasing Division and the West Virginia State Auditor's Office, the content of this training is updated each year to reflect the most up-to-date purchasing rules and regulations, as well as

any changes in the law.

This training is required for the state's high-level officials and is conducted twice each year, in accordance with *West Virginia Code* §5A-3-60. This law requires all high-level state officials, including "executive department cabinet secretaries, commissioners, deputy commissioners, assistant commissioners, directors, and their deputies and assistants, deputy directors, assistant directors, department heads, deputy department heads, and assistant department heads," to complete two hours

of training annually on purchasing procedures and purchasing card processes.

Watching the training online will suffice to meet this requirement. To view the recording, visit www.youtube.com/watch?v=KaEn0pnh8D8. In order to receive credit for viewing the training, individuals must submit the *Certificate of Completion* by email to Purchasing.Training@wv.gov or by fax to 304.558.6026. Questions regarding this training may be directed to Samantha Knapp at 304.558.7022.

Purchasing Division Training Now Qualifies for CPE Credit

The Purchasing Division's training program now qualifies for Continuing Professional Education (CPE) credit for Certified Public Accountants (CPA). Those eligible and wishing to obtain CPEs can choose from a variety of topics, including *Developing Specifications and Contracting*; *Preparing and Evaluating RFPs*; and the *Solicitation Process*. These and other topics are taught periodically in the Purchasing Division office and during the annual state purchasing conference.

Participants can earn from one to six and a half hours of CPE credit, de-

pending on the length of the training.

CPEs are required for CPAs to maintain their professional competence and provide quality professional services. CPAs are responsible for complying with all applicable CPE requirements, rules, and regulations of the state Board of Accountancy, as well as those of membership associations and other professional organizations.

To view the amount of approved CPEs for each session offered as part of the 2018 In-House Training Program, you may view the schedule on page 3.

Delivery Order

Continued from Page 1

"Delivery Orders help us track the amount being purchased for each particular item. If there is a high volume being purchased, we may be able to negotiate a lower price in the future," explained Buyer Supervisor Linda Harper. "But without a Delivery Order on file for these items, the Purchasing Division cannot get an accurate look at the effectiveness of these contracts." She added that it is important to create the Delivery Order at the time of the order and not to wait until an invoice is received.

Alternatively, if the Purchasing Division sees that a statewide contract is not being used, it is possible that the contract will not be renewed or rebid in future years.

In addition to helping the Purchasing Division judge the effectiveness of statewide contracts, Delivery Orders also offer several unique benefits for agencies. Creating Delivery Orders for all purchases can help an agency monitor its spend on specific items. Being able to check the date and spend amount through the Delivery Order will allow agencies to see if they are approaching the next bidding threshold. For larger divisions and departments, Delivery Orders also provide a way to look at the spend of individual agencies and offices.

The payment method is not part of the purchasing process. An agency

choosing to use its Purchasing Card or the GAX process does not automatically attribute that spend to specific contracts issued by the Purchasing Division. No matter the payment method, a Delivery Order should be completed to provide correct and invaluable documentation. When it is time for an inspection, inspectors within the Contract Management Unit of the Purchasing Division will reference payment methods back to the Delivery Orders and then to statewide contracts and Master Agreements.

Agencies currently not using *wvOASIS* should complete the **Release Order** (WV-39) located on Purchasing's Intranet site at <http://intranet.state.wv.us/admin/purchase> for any release to a Central Master Agreement.

Training and information on completing a Delivery Order is available at www.wvoasis.gov in the Enterprise Readiness section of "My Apps." Agencies should select the "Training" option, then choose "Financial" and "Watch Try Print Quiz" from the dropdown menus.

The "Issue a Delivery Order" segment will provide a demonstration, simulation, assessment, and downloadable guide for completing a Delivery Order. A direct link to the training is https://my-apps.wvsao.gov/apps/myOASIS/EnterpriseReadiness/Training/Sims/Sim_16_IsuDelOrdr/IsuDelOrdr_Launch.htm.

New Purchasing Card Contract Announced

A new contract has been awarded for the state Purchasing Card Program, effective November 11, 2017. The contract, AUD18*1, was awarded to US Bank. Because this contract has such a large impact to state employees and businesses, the transition is being carefully coordinated.

The West Virginia State Auditor's Office is currently developing its implementation plan. Updates on the transition will be shared on www.wvsao.gov as the information becomes available.

Future updates regarding this contract will also be shared in an upcoming issue of *The Buyers Network*.



THE BUYERS NETWORK

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Current Statewide Contract Update

(As of November 15, 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.

New Contract

Contract	Vendor	Commodity	Effective Date
MV18A	Bob Robinson	Motor Vehicles	11/01/17 -10/31/18
MV18B	Greenbrier Motor Co Inc	Motor Vehicles	11/01/17 -10/31/18
MV18C	Jim Robinson Inc	Motor Vehicles	11/01/17 -10/31/18
MV18D	Stephens Auto Center	Motor Vehicles	11/01/17 -10/31/18
MV18E	Matheny Motor Truck Co	Motor Vehicles	11/01/17 -10/31/18
MV18F	Whiteside Of St Clairsville Inc	Motor Vehicles	11/01/17 -10/31/18
MVTRUCK18A	Bob Robinson	Motor Vehicles (Trucks)	10/15/17 -10/14/18
MVTRUCK18B	Greenbrier Motor Co Inc	Motor Vehicles (Trucks)	10/15/17 -10/14/18
MVTRUCK18C	Matheny Motor Truck Co	Motor Vehicles (Trucks)	10/15/17 -10/14/18
MVTRUCK18D	Stephens Auto Center	Motor Vehicles (Trucks)	10/15/17 -10/14/18
NTIRE18	Goodyear Tire & Rubber Co	Tires and Tubes	11/15/17 -11/14/18
PBKCR10BB	Enterprise Truck Co	Vehicle Leasing	11/07/17 -10/18/18
VOIP13E	Verizon Business	Telecommunication Services	10/21/17 -10/20/18

Contract Renewal

Contract	Vendor	Commodity	Effective Date
FAR17*1	Bank of America	Debt Servicing	11/30/17 -11/30/18
FOOD16B	US Foods Inc.	Food Supplies	09/30/17 -09/30/18

SWC*25	Verizon Business	Telecommunication Services	10/31/17 -10/31/18
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Miscellaneous Actions

Contract	Vendor	Commodity	Description of Change
PBKCR10B	Enterprise	Vehicle Leasing	To cancel contract CMA PBKCR10B
SWC*19	Komax LLC	Photocopiers	To add pricing pages for options

FOR MORE INFORMATION

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

BUYER	E-MAIL	PHONE
<u>Supervisors</u>		
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
<u>Senior Buyers</u>		
Mark Atkins	Mark.A.Atkins@wv.gov	558-2307
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
Stephanie Gale	Stephanie.L.Gale@wv.gov	558-8801
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