

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

## Inspectors Commend Agencies for Compliance, Correct Use of Vendor Fee Exemption Codes

Any vendor receiving a contract/purchase order for goods or services from the state exceeding \$2,500 must pay the annual registration fee of \$125, but there are several exceptions to the fee payment. In those cases, it is important for agencies to distinguish and enter the proper vendor registration fee exemption code in *wvOASIS* for an award transaction.

The inspectors within the Purchasing Division's Contract Management Unit monitor the use of these fee exemption codes as part of the inspection process to ensure compliance with fee exemption usage laws and rules. Improper use results in an inspection finding, but the inspectors are pleased to note that overall agencies are doing a much better job of using these codes correctly.

"When the vendor registration fee exemption codes became available for agency use, we found many of the agencies misusing the codes," said State Purchasing Contracts Manager Greg Clay. "The codes were so misused that we implemented this act as a finding within the vendor registration portion of our inspection process. The most commonly misused code was the small dollar and P-card exemption code. After proper training, inspections, and sending out letters to notify agencies of the misused exemption codes,

**Issue 5: Vendor Registration Unverified/Wrong Vendor Fee Exemption Code Utilized**

**Authority:** W. Va. CSR § 148-1-6.1; Procedures Handbook Section 4

**Explanation:** The agency must verify that the vendor is registered, and the registration fee paid, if applicable. The registration process includes having the proper disclosure of information in the *wvOASIS* vendor/customer account. Certain vendors are exempted from paying the vendor registration fee mandated by the authority referenced above. *wvOASIS* has created fee exemption codes that allow the spending unit to designate the appropriate exemption code on a transactional basis. An improper exemption code was utilized in the processing of the transactions listed below.

**Total Instances:** 3

**Transactions in Violation: (2 Instances)** The 2 instances of improper exemption code will be reflected in the **Finding** Summary of the Grading Sheet. Due to the grouping of same or similar commodities or services, the transactions reviewed misusing the Vendor Exemption Code totals 8 and will reflect this in the **Non-Conformance Rate** of the Grading Sheet.

**1 Instance (Grouped)**

| Date | Description | Vendor | Amount | Transaction |
|------|-------------|--------|--------|-------------|
|------|-------------|--------|--------|-------------|

this finding has decreased greatly among agencies."

Purchasing card vendors providing travel-related services are exempt from paying the fee, as well as Purchasing Card vendors receiving an aggregate total yearly payment of less than \$25,000 from a spending unit; vendors receiving orders

Please see **FEE EXEMPTION CODES** page 6

## INSIDE...

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- Purchasing Celebrates 30 years of NIGP Membership
- Updated Purchasing Webpage Improves Access to Statewide Contract Information

## Contract Awards, Change Orders Now Posted Online

It has long been a goal of the Purchasing Division to post contract awards on its website, and effective immediately, this has become a reality. The unofficial posting of awards of new contracts, as well as change orders and delivery orders from current contracts, are posted daily as applicable. These documents can be viewed on the Purchasing Division's Transparency webpage at [www.state.wv.us/admin/purchase/transparency.html](http://www.state.wv.us/admin/purchase/transparency.html), or can be accessed directly at [www.state.wv.us/admin/purchase/Awards/awarded.html](http://www.state.wv.us/admin/purchase/Awards/awarded.html). Please keep in mind that the scanned copy maintained at the Purchasing Division offices will still serve as the official contract file for all solicitations and is available for viewing during normal business hours.

As the staff at the Purchasing Division continues to look for opportunities to improve customer service as well as transparency when spending

Please see **CONTRACT AWARDS** page 5

## Implementing Successful Change Requires Constant Evaluation and Transformation

Each year, state government takes on a slightly different shape thanks to new laws and rules passed by the Legislature, past missteps or natural endings that lead to new initiatives, and outside forces that necessitate change. It has been said that the only constant is change. By our very nature, we change through the different phases of our lives, through our professional careers, and through our experiences. Change can reshape who we are and how we do things, and when embraced and calculated, can bring order (and opportunity) to our lives.

As the 2021 Legislative Session wraps up, we are keeping an eye on a bill that would potentially mean changes (and affect many state agencies) moving forward. House Bill 2787, and its Senate version, Senate Bill 487, would authorize the Purchasing Director to increase the agency delegated procurement limit for state agencies under our authority based on inspection grade. Currently, the limit is set at \$25,000. If signed into law, the bill would increase that amount up to \$100,000, where applicable. While this change would take time to implement, it is a step in the right direction toward providing agencies with more purchasing autonomy without completely eliminating oversight.

As showcased by these bills and others this legislative session, implementing successful change requires constant evaluation and modification of programs, as needed. Understanding this change and how it aligns to overall goals drives even more change over time. Take the federal government, for example. It already grants the West Virginia State Agency for Surplus Property (WVSASP) the authority to facilitate the transfer of federal surplus property to eligible organizations. Now, however, it has taken one more step toward providing that property to others who need it.

In early 2019, the federal government enacted into law the

Veteran's Small Business Enhancement Act of 2018, which allows WVSASP to facilitate the transfer of federal property to eligible veteran-owned small businesses in West Virginia. Over the last two years, the National Association of State Agencies for Surplus Property worked with the Small Business Administration (SBA) and U.S. General Services Administration (GSA) to finalize the program requirements and develop a memorandum of agreement permitting each state's participation. West Virginia entered into that agreement last month, and our hope is that veterans statewide will soon benefit.



The WVSASP will conduct a free webinar for veterans on Wednesday, April 7, 2021, to discuss the details of this program. More information on the webinar and program can be found online at [www.state.wv.us/admin/purchase/surplus/veterans.html](http://www.state.wv.us/admin/purchase/surplus/veterans.html).

Please do not forget to submit your Procurement Profile and closeup photo(s) for our upcoming digital publication highlighting our agency procurement officers. We know that many agencies have experienced changes in staff since our last in-person event was held. This publication is our way of saying, "We haven't forgotten you."

And we hope you haven't forgotten us. Please let us know how we can assist you moving forward in implementing effective change.

With the annual Open House on hold once again due to COVID-19, the Purchasing Division is trying a new approach to encourage networking among procurement officers. This year, the Purchasing Division is collecting and will digitally publish *Procurement Profiles: A Directory of State Procurement Officials*. In addition to the contact information for Purchasing Division staff, this publication will also highlight profiles of our agency procurement officers.

"It is always nice to put a face to a name you see on contracts and emails or a voice you've heard on the phone," said State Purchasing Director Mike Sheets. "While we cannot physically gather together this year, I want to encourage our agency procurement officers to use this publication to get to know one another."

The publication, which will be published by the end of May, will include a picture of each participating procurement officer, how long they have worked in state government, and contact information. Participants are also invited to share their hobbies and complete a series of get-to-know you prompts such as their most memorable procurement or one piece of procurement advice they wish they had known sooner.

All agency procurement officers are encouraged to submit their information to this publication at <https://forms.gle/zgtg-dUPw5LHPGahq5> by Friday, April 9, 2021. Questions or concerns about this publication should be directed to Public Information Specialist II Jessica L. Chambers at [Jessica.L.Chambers@wv.gov](mailto:Jessica.L.Chambers@wv.gov).

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# What Do They Do? Transparency Specialist Lu Anne Cottrill Makes Bids Accessible to Public

One of the goals of the Purchasing Division is to provide transparency to the citizens of the state of West Virginia, its partner state agencies, and the vendor community. Making that happen each day is the primary responsibility of Quality Control and Transparency Specialist Lu Anne Cottrill. Cottrill, an employee within the Business and Technical Services section, is responsible for posting all bids received for central solicitations to the Purchasing Division's Bids Received webpage. Paper bids are scanned to her internally and all electronic bids are pulled directly from *wvOASIS* and saved to the computer. That information is compiled, saved, and then published to a webpage built by Cottrill for each day's bid openings.

"The bid information starts in separate places, so I have to pull everything together," she said. "I use the assigned file number on the bid as the title. As I build the page, I make sure I am looking at the right solicitation, make sure each bid was received before 1:30 p.m. on the day of the bid opening, and make sure everything looks right. I always try

to get the bids posted the same day as the opening."

As part of this process, Cottrill must include addenda, when applicable, and convert every document to a PDF so that it can be posted in a viewable format.

"Some people are so nice because they take all their addenda and scan them as just one file. I have had bids with up to 80 attachments, single page files," she continued. "Or one of those attachments might be an Excel spreadsheet, and the spreadsheet itself might have 10 pages in it. All documentation has to be saved together as a single file in most cases to be posted, so I always have to be on my toes to make sure that I get everything."

Cottrill then goes through each bid page by page and looks for personal information that needs redacted.

"People include resumes with their bids that contain their phone numbers and addresses," Cottrill said. "We get bid bond checks, and I always redact the bank name and numbers, especially if it is a personal check. License numbers, such as those from licensing boards,



**Lu Anne Cottrill serves as the Quality Control and Transparency Specialist for the Business and Technical Services section. Cottrill has worked in this role for many years and will retire in October.**

have to be redacted."

Other information that requires redaction includes medical information and social security numbers (SSN) (mostly used as the Federal Employee Identification Numbers [FEIN]). Cottrill said she looks closely at the FEINs to make sure they are not SSNs. She said SSNs contain three numbers--two numbers--four numbers. FEINs are two numbers and then six numbers.

"One time, we had an aerial pesticide

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**Please see BID POSTINGS, page 5**

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## Purchasing Celebrates 30 years of NIGP Membership

The Purchasing Division has existed since 1933, and 30 of those years have been spent as a member of the National Institute of Governmental Purchasing (NIGP). The organization recently sent State Purchasing Director Mike Sheets a letter marking the Division's membership anniversary.

NIGP has been the leading voice of state and local public procurement professionals across the United States and Canada for more than 75 years. The goal of the organization is to develop a strong and engaged community of procurement

practitioners, to support their professional growth and development, and to empower them with innovative programs.

Former Assistant Purchasing Director Diane Holley-Brown, now retired, was part of the staff when the Division first joined.

"Throughout our membership, NIGP has been a vital source of global and national procurement research and data from which the West Virginia Purchasing Division has gained great value," said Holley-Brown. "We have used this information to assist us in making decisions

regarding our own procurement solutions within our state. It has also allowed our staff to capture different perspectives from other public procurement entities through an ongoing collaborative exchange of ideas and discussions. As an added benefit, NIGP's educational offerings have benefited our agency through its broad selection of subject topics and training formats."

NIGP offers virtual conferences; the NIGP Forum, which is the largest conference for public procurement professionals in North America; free webinars; and various pathways to achieving certifications, specializations, and designations. It also offers networking, mentorship, and a document library with thousands of solicitations, RFPs, and RFIs.

**NIGP** The Institute for  
Public Procurement

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# Purchasing Division Welcomes New Employees

The Purchasing Division is pleased to welcome three new employees to its staff.

Teresa Cutlip will serve as the Public Information Specialist II in the Communication and Training Section. She is from Rupert and graduated from Concord College (now University) and lives in Charleston. She previously worked for several newspapers, as well as in the media relations department at Clemson University, and most recently in the office of the U.S. Attorney for the Southern District of West Virginia. She enjoys kayaking, whitewater rafting, '70s sitcoms, and her three cats.

"I look forward to being a part of the communication and training efforts of the Purchasing Division and playing a role in the betterment of West Virginia employees and residents," Cutlip said.

Leslie Gwinn joins the Contract Management Unit as an Inspector I. Originally from Calhoun County, she currently resides in Jackson County. Before coming to the Division, she worked in the construction industry for more than 25 years. She enjoys spending time with



**Teresa Cutlip**



**Leslie Gwinn**



**Megan Snodgrass**

her family and friends, appreciating the great outdoors, and reading.

"I am looking forward to meeting the people I will be working with, along with the new learning opportunities I will have as an employee in the Purchasing Division," Gwinn said.

Megan Snodgrass will serve the Division as an Office Assistant II. She lives in St. Albans and previously worked as a Human Resources Assistant at Mardi Gras Casino and Resort. She enjoys spending time with her family, which includes two boys ages seven and 10.

"I'm looking forward to working with everyone," she said.

Welcome Cutlip, Gwinn, and Snodgrass to the Purchasing Division!

## Updated Purchasing Division Webpage Improves Access to Statewide Contract Information

In an effort to improve its online services, the Purchasing Division is pleased to announce it has updated its statewide contracts index page. This includes updates to some of the names and language provided in reference to the contracts and expanding the search box feature.


"The Purchasing Division is continually looking for opportunities

to improve access to information as well as provide useful tools that help state agencies achieve their goals," said Business and Technical Services Manager Guy Nisbet. "We listen to agency feedback and, when possible, the Purchasing Division makes modifications or procedural changes. One of these requests was to update and make the statewide contracts index page more modern, easier to read, and provide more detailed information."

The updated statewide contracts index page was launched in February 2021. This project began in late 2020 and was a team effort among each of the Purchasing Division's sections.

"This is just one visible project of the many that the Purchasing Division has recently undertaken per the request of our customers," added Nisbet.

If you have a suggestion for further website improvements, please contact the Purchasing Division at [Purchasing.Division@wv.gov](mailto:Purchasing.Division@wv.gov).



CLICK HERE FOR A SUMMARY OF RECENT UPDATES, CHANGE ORDERS, CANCELLATIONS, ET CETERA

Search:   Example: furniture

| Description  | Contract                  |
|--|---------------------------|
| <b>Asbestos Abatement Services</b>   | <a href="#">ABAMNT</a>    |
| <i>This contract includes various asbestos abatement services, including, but not limited to, removal of asbestos material, pipefitting, and insulation.</i> |                           |
| <b>Auto Parts</b>  | <a href="#">MVPARTS</a>   |
| <i>This contract includes motor vehicle auto parts.</i>  |                           |
| <b>Batteries (Automotive &amp; Equipment)</b>  | <a href="#">AEBATTERY</a> |
| <i>This contract includes automotive and equipment lead acid batteries of various sizes and voltages, for both industrial and heavy commercial use.</i>      |                           |
| <b>Box Truck Rentals</b>   | <a href="#">COMTRKRN</a>  |
| <i>This contract with Enterprise Rent A Car Co. is to provide Nationwide Commercial Truck Rental Services.</i>   |                           |

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## CONTRACT AWARDS

Continued from Page 1

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taxpayer monies, the Awards Page notifications webpage seemed like an obvious next step. This page allows any party interested in either a particular solicitation or purchases in general the ability to find this information in one place within one business day of being encumbered, including award documentation. Vendors and agencies can now download documents without having to wait on the mail.

“This is an initiative that the Division believes will improve the speed at which the award process is captured and interested parties notified,” said Assistant Director Guy Nisbet. “We continue to improve our processes where and whenever possible.”

Each award document and change order is posted the day after encumbrance has occurred and will remain posted for 90 days. The information contained on this page includes:

- The solicitation number, if known.
- The award document type and unique identifier number.
- The agency for which the award was made.
- A description of the good or service for which the contract or change order was issued.
- The bid opening date for the solicitation that was awarded, along with a link to the applicable bids, if known.
- The encumbrance date.
- The transaction type, such as change orders or new awards.

Please note that both successful and unsuccessful vendors will still receive a faxed notice of the award until the Purchasing Division transitions to same-day email notifications. This will occur as soon as solicitations are processed using the Purchasing General Terms and Conditions revised on March 15, 2021. All awards and change orders will be posted within 24 hours of that notice. The notice will contain a link to the award page and cite identifying information for easy reference. Awards and change orders may be downloaded and retained for an agency’s personal records.

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## BID POSTINGS

Continued from Page 3

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spray solicitation where the vendor put all the pilot licenses in the bid. One of the pilots only had one leg, and they went into detail about that in the bid, so a lot of that personally identifiable information (PII) had to be redacted,” Cottrill said. “We had one vendor include scanned copies of passports for his employees. We had another vendor include her resume with her bid. She didn’t want her resume out there publicly, and we redacted what we were required to redact, but because it was submitted as part of the bid, we could not redact the entire resume.”

Every bid the Purchasing Division has received since 2006 is posted on its website.

“We started putting bids online because sometimes if a vendor didn’t win a contract award, they wanted to know why. They wanted to come in and look at the bids, which was fine,” Cottrill said, “but when they did that, somebody had to sit with them. We couldn’t leave a vendor alone with the bids, so that took up a lot of staff time.”

Posting bids to its website made it easier for interested parties to view them while allowing the Purchasing Division to be more transparent. In addition to bids received, the Purchasing Division maintains a transparency website with additional information. That website can be accessed at [www.state.wv.us/admin/purchase/transparency.html](http://www.state.wv.us/admin/purchase/transparency.html).

Cottrill will be retiring in October 2021 after more than 11 years with the Division. She said she has enjoyed the job.

“I have learned a lot about computers and websites since I’ve been here,” Cottrill shared, “as well as important laws and policies, such as PII. I have learned to convert documents to PDF, combine files, etc. It is automatic now. I can figure things out that I didn’t know before because of the things I’ve learned. There’s never a dull moment or day.”

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## wvOASIS Training Now Available Online

A recent training by wvOASIS Finance Team is now available for viewing on demand. This webinar, *Avoiding Common wvOASIS Payment and Procurement Issues*, was originally presented on Feb. 24, 2021.

Topics covered in this webinar include:

- quarterly allotment budget errors;
- condition codes;
- commodity lines;
- commodity email push;
- master agreements and quantities; and,
- delivery order reminders.

This webinar has been approved for 2.0 CPE credits for Certified Public Accountants by the West Virginia Board of Accountancy. A copy of this presentation can be found on [wvOASIS.gov](http://wvOASIS.gov) under myApps.

### THE BUYERS NETWORK

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8:15 a.m. to 4:30 p.m. (M-F)

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## New Contract Awarded for Records Management

A new records management and storage services statewide contract has been issued to Horizon Technologies, Inc., effective March 1, 2021. This contract, RECMGT21, replaces the one previously held by Iron Mountain.

Please note that there will be a transition period over the next few months to move all records to the new vendor. While the current contract is still in effect, Records Management Program Manager Donna Lipscomb will be working with each agency's designated records manager as expeditiously as possible to facilitate the safe and secure transfer of all records from Iron Mountain's Kanawha City facility to the new records center in Dunbar. Be advised that new account access authorizations will be required for each agency that grants employees authorization to access their agency's records.

Once all records have been transferred, you can contact the new vendor below with any questions. You can also find a link to the contract posted on the Purchasing Division's website.

Tanya Lovern, Director of Operations  
434.857.3211

[tlovern@horizontech.com](mailto:tlovern@horizontech.com)

Should you have any questions related directly to this contract or need further assistance, please contact Donna Lipscomb at [donna.m.lipscomb@wv.gov](mailto:donna.m.lipscomb@wv.gov) or Statewide Contracts Buyer Mark Atkins at [mark.a.atkins@wv.gov](mailto:mark.a.atkins@wv.gov).

## FEE EXEMPTION CODES

Continued from Page 1

for goods or services totaling an aggregate of \$2,500 or less, across all state agencies, regardless of payment method; and vendors providing a good or service under a direct award.

In addition to these exceptions, any vendor can be exempted from paying the registration fee if the Purchasing Director determines that waiving the registration fee is in the best interest of the state of West Virginia. Those include government entities and vendors offering commodities and services under Section 9 of the *Purchasing Division Procedures Handbook*.

It is important to note that all vendor fee exemptions are determined on a transactional basis. A vendor may be exempted from paying the fee on a certain transaction, but later be required to pay the fee on a separate transaction.

Before utilizing a vendor registration fee exemption code, an agency should check the vendor's record to see if the vendor has already paid the vendor registration fee at a previous time. If a vendor has already registered and provided the disclosure of information as well as paid the annual fee, there is no need to use the vendor registration fee exemption code.

It is never appropriate to use a fee exemption code in connection with a delivery order against a statewide contract. If an agency discovers that the one-year registration fee payment period for a vendor holding a statewide contract has expired, the agency should notify the vendor of the need to update its disclosure of information and pay the annual fee.

## Current Statewide Contract Update

(As of March 15, 2021)

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](http://www.state.wv.us/admin/purchase/swc). For more information, please contact the buyer assigned to statewide contracts.

### Contract Renewals

| Contract  | Vendor   | Commodity         | Effective Date        |
|-----------|----------|-------------------|-----------------------|
| CENTREX19 | Frontier | Telecomm Services | 03/01/21<br>-02/28/22 |

### Miscellaneous Actions

| Contract | Vendor                                       | Commodity                | Description of Change                |
|----------|--|--------------------------|--------------------------------------|
| ESRI21   | Environmental Systems Research Institute Inc | Geographical Info System | To publish the updated pricing pages |

## 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        | <a href="mailto:Tara.L.Lyle@wv.gov">Tara.L.Lyle@wv.gov</a>               | 558-2544 |
| Linda Harper     | <a href="mailto:Linda.B.Harper@wv.gov">Linda.B.Harper@wv.gov</a>         | 558-0468 |
|                  | <u>Senior Buyers</u>   |          |
| Mark Atkins      | <a href="mailto:Mark.A.Atkins@wv.gov">Mark.A.Atkins@wv.gov</a>           | 558-2307 |
| Jessica Chambers | <a href="mailto:Jessica.S.Chambers@wv.gov">Jessica.S.Chambers@wv.gov</a> | 558-0246 |
| Josh Hager       | <a href="mailto:Joseph.E.Hageriii@wv.gov">Joseph.E.Hageriii@wv.gov</a>   | 558-8801 |
| Crystal Hustead  | <a href="mailto:Crystal.G.Hustead@wv.gov">Crystal.G.Hustead@wv.gov</a>   | 558-2402 |
| Melissa Pettrey  | <a href="mailto:Melissa.K.Pettrey@wv.gov">Melissa.K.Pettrey@wv.gov</a>   | 558-0094 |
| David Pauline    | <a href="mailto:David.H.Pauline@wv.gov">David.H.Pauline@wv.gov</a>       | 558-0067 |
|                  | <u>Buyers</u>  |          |
| John Estep       | <a href="mailto:John.W.Estep@wv.gov">John.W.Estep@wv.gov</a>             | 558-2566 |
| Dusty Smith      | <a href="mailto:Dusty.J.Smith@wv.gov">Dusty.J.Smith@wv.gov</a>           | 558-2063 |
| Toby Welch       | <a href="mailto:Toby.L.Welch@wv.gov">Toby.L.Welch@wv.gov</a>             | 558-8802 |

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