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Director’s Manual

JANUARY 2025

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# Introduction

**GENERAL INFORMATION, DESCRIPTIONS & RESOURCES**

This manual is intended to be a high-level reference guide. It does not include forms and instructions. We also have an Executive Assistant’s Manual that includes an overview of processes, forms with links to instructions, and blank forms.

##

## DES Small Agency Support Primary Contacts (links)

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| [Small Agency Financial Services](https://des.wa.gov/services/small-agency-support/financial-services/contacts)

| **​Item** | **Email Address** |
| --- | --- |
| Payroll | DESPayroll@des.wa.gov |
| Human Resources | SAA@des.wa.gov |
| ​Accounts Payable documents | payments.safs@des.wa.gov |
| Accounts Payable questions | APquestions.safs@des.wa.gov |
| Travel documents | travel.safs@des.wa.gov​ |
| Cashier and Accounts Receivable documents | FinanceCashier@des.wa.gov |

[Small Agency HR Services](https://des.wa.gov/services/small-agency-support/human-resources/small-agency-hr) Phone: (360) 902-7490 E-mail: SAA@des.wa.gov[Small Agency Contracts and Procurement Support](https://des.wa.gov/services/small-agency-support/contracts-and-procurement-support)Phone: (360) 407-2209Email: DESProcurementConsulting@des.wa.gov |  |

## Small Agency Financial Services

Small Agency Financial Services provides accounting, budgeting, and payroll services for more than 40 small agencies. Having us provide these services allows agency staff to focus their efforts on achieving the agency’s mission, fulfilling the agency’s strategic plan, and using its limited resources more efficiently to serve its constituencies.

We provide a wide variety of services to clients including, but not limited to:

Accounting

* Expenditure/disbursements including vendor payments, employee and commissioner travel, and other state agency payments
* Revenue including invoicing, accounts receivable, and deposits/cash receipts.
* Fixed asset accounting
* Bank statement reconciliations for local accounts
* Financial reporting
* Archiving of the financial, budgeting, and payroll records according to record retention requirements.
* Miscellaneous income (Federal Form 1099) and excise tax reporting
* Audit coordination with the State Auditors’ Office

Budgeting

* Biennial & supplemental budget development assistance
* Projection development
* Fiscal note preparation & coordination assistance
* Allotment preparation
* Financial report analysis and monitoring
* Financial consulting
* Governor directed mandatory reporting of compensation and performance measures

Personnel & Payroll

* Input information for employees
* Supply information on payroll changes to agencies
* Prepare state and federal reports
* Prepare semi-monthly payroll
* Reconcile the payroll funds, retirement and withholding
* Process insurance and benefits information
* Annual W2 reporting for employees

Resources

* Learn more at [DES Small Agency Financial Services - Rates and Services Commitment](https://des.wa.gov/sites/default/files/2024-04/SAFS-rate-service-commitment.pdf)

## Small Agency HR Services

Small Agency HR Services provides human resources consultation and technical support to small agencies. Having us provide these services benefits agencies by offering consultants who are experts in the HR profession, timely and accurate service, knowledge that HR decisions and actions meet legal standards and requirements, and assurance that your expectations are a top priority.

A Full Line of HR Services

* **Employment** – Provide end-to-end recruitment services including recruitment planning, posting of positions through the Online Recruiting System (OLRS), assessment and selection activities, job seeker support and appointment letters when candidates are hired.
* **Classification** – Determine position allocations and provide employee notification letters for appointing authority. Provide consultation on the development of position descriptions. Provide desk audits when needed. Assist with WMS and EMS evaluations and banding.
* **Employee Relations** – Provide rules guidance and interpretation for non-represented state employees. In consultation with the Labor Relations Office, assist agencies with guidance for represented employees.
* **Performance Management** – Provide consultation on performance appraisals, performance communication strategies and assist in setting expectations. Consult on corrective and disciplinary actions; assist with documentation, and processing including development of disciplinary letters. Provide tools and checklists.
* **Personnel Policies & Procedures** – Develop standardized policies and procedures to support Small Agencies in meeting its federal and state legal requirements. Review current agency policies for compliance.
* **Human Resources Administration** – Provide personnel forms, letters, organizational charts and assistance/letters for Shared Leave/Family and Medical Leave, reasonable accommodations and workers compensation.
* **Workforce Data Analysis** – Provide reports and information such as Affirmative Action roll-ups as needed to assist Small Agencies.
* **Workforce Management Support** – Assist with “just in time” HR projects such as temporary layoffs and hiring freezes and changes that occur in Washington Management Service.
* **Human Resource Related Meetings** - Provide Small Agencies with a HR consultant to discuss current HR topics and keep them informed on HR issues at quarterly meetings, or as needed.

Contacts and Web Resources

* Learn more at [Small Agency HR | Department of Enterprise Services (DES)](https://des.wa.gov/services/small-agency-support/human-resources/small-agency-hr)
* Phone: (360) 902-7490 | Mail Stop: 41414
* E-mail: SAA@des.wa.gov

## Office of Risk Management

The Office of Risk Management (ORM) administers the Self-Insurance Liability Program. This program investigates, processes, and adjudicates all tort and sundry claims filed against Washington state agencies.

ORM also manages risk financing (including commercial insurance), provides loss prevention services, and administers the loss prevention review team program. In addition, it provides oversight of joint self-insured local government property/liability programs and individual or joint self-insured local government employee health and welfare benefit programs.

Our services include:

## [**Agency budget risk management**](https://www.des.wa.gov/policies-legal/risk-management/agency-budget-risk-management)

## [**File a tort claim**](https://www.des.wa.gov/policies-legal/risk-management/online-filing/file-tort-claim)

## [**Local Government Self-Insurance Program**](https://www.des.wa.gov/policies-legal/risk-management/local-government-self-insurance)

* [Health & welfare programs](https://www.des.wa.gov/policies-legal/risk-management/health-welfare-programs)
* [Joint property & liability programs](https://www.des.wa.gov/policies-legal/risk-management/joint-property-liability-programs)
* [Related links](https://www.des.wa.gov/policies-legal/risk-management/local-government-self-insurance-program-links)

## [**Risk finance program**](https://www.des.wa.gov/policies-legal/risk-management/risk-finance-program)

* [Commercial insurance](https://www.des.wa.gov/policies-legal/risk-management/commercial-insurance-policies)
* [Notary bonds](https://www.des.wa.gov/policies-legal/risk-management/notary-bonds)
* [Self-Insurance Liability Programs](https://www.des.wa.gov/policies-legal/risk-management/state-agency-self-insurance-liability-program)

## [**Enterprise Risk Management**](https://www.des.wa.gov/policies-legal/risk-management/enterprise-risk-management)

## [**Loss Prevention Program**](https://www.des.wa.gov/policies-legal/risk-management/loss-prevention-program)

* [Requirements for van safety](https://www.des.wa.gov/policies-legal/risk-management/loss-prevention-program/loss-prevention-requirements-van-safety)
* [Loss Prevention Review Team](https://www.des.wa.gov/policies-legal/risk-management/loss-prevention-review-team)
* [Studies and research projects](https://www.des.wa.gov/policies-legal/risk-management/loss-prevention-program)

## [**State Driver Vehicle Accident/Collision Report**](https://www.des.wa.gov/policies-legal/risk-management/state-vehicles-and-drivers)

* [State Employee Incident Reporting](https://www.des.wa.gov/policies-legal/risk-management/state-vehicles-and-drivers)

Contacts and web resources

* DES Website: [About Risk Management | Department of Enterprise Services (DES)](https://www.des.wa.gov/policies-legal/risk-management/about-risk-management)
* Contacts: [Risk Management Contacts | Department of Enterprise Services (DES)](https://www.des.wa.gov/policies-legal/risk-management/risk-management-contacts)

## Important Web Sites

Department of Enterprise Services

**Small Agency Services**

<http://des.wa.gov/services/HRPayroll/SmallAgency/Pages/default.aspx>

**Risk Management**

<http://des.wa.gov/services/Risk/AboutRM/Pages/agencyBudgetRiskManagement.aspx>

**Training**

<http://des.wa.gov/services/HRPayroll/Training/Pages/default.aspx>

**Contracts and Purchasing**

<http://des.wa.gov/services/ContractingPurchasing/Pages/default.aspx>

Office of Financial Management

**State Administrative and Accounting Manual (SAAM)**

<http://www.ofm.wa.gov/policy/default.asp>

**Washington State Budget Process**

<http://www.ofm.wa.gov/reports/budgetprocess.pdf>

**Administrative and Accounting Resources**

<http://www.ofm.wa.gov/resources/default.asp>

Washington State Legislature

**Revised Code of Washington (RCW)**

<http://apps.leg.wa.gov/rcw/>

**Washington Administrative Code (WAC)**

<http://apps.leg.wa.gov/wac/>

Other Service Agencies

|  |  |
| --- | --- |
| **Dept. of Corrections**<http://www.doc.wa.gov/> **Dept. of Retirement Systems**<http://www.drs.wa.gov/>**Office of the Secretary of State**<http://www.secstate.wa.gov> **Office of the State Auditor**<http://www.sao.wa.gov/>**Office of the Equity**<https://equity.wa.gov/> | **Executive Ethics Board**<http://www.ethics.wa.gov/>**Health Care Authority**<http://www.hca.wa.gov> **Office of Administrative Hearings**<http://www.oah.wa.gov/>**Office of the Attorney General**<http://www.atg.wa.gov/> |

Other Web Sites

**Access Washington – The Official State Government Web Site**

<http://www.access.wa.gov>

# Budget

**Process, Instructions, OFM Analyst**

## Washington State Budget Information

Washington State Budget Process

<https://ofm.wa.gov/sites/default/files/public/publications/WaStateBudgetProcessGuide.pdf>

**Budget Instructions**

* Allotments – <https://www.ofm.wa.gov/budget/budget-instructions/allotment-instructions>
* Instructions - <https://ofm.wa.gov/budget/budget-instructions>
* Forms – <https://www.ofm.wa.gov/budget/budget-instructions/budget-forms>

**Budget-related Information**

<https://ofm.wa.gov/budget/budget-related-information>

**Find your OFM Budget Analyst**

<https://ofm.wa.gov/budget/budget-staff-agency-assignments>

## Agency Request Legislation

**Office of the Code Reviser Bill Drafting Guide**

<http://leg.wa.gov/CodeReviser/Pages/bill_drafting_guide.aspx>

**OFM Procedures and Required Elements Checklist**

<https://www.ofm.wa.gov/budget/budget-instructions/other-instructions>

## Rule Making Process

A rule (or regulation) is a written policy or procedure by a state agency that is generally applicable to a group of people, industries, activities, or circumstances. Rules are used by agencies to “fill in the gaps” of legislation. They implement, interpret, apply or enforce a state or federal law or court decision. A rule is adopted by an agency; a statute is a law that is passed by the state Legislature. In both cases, state law provides for citizen participation before a rule or law is approved.

After laws are passed by the state Legislature and signed by the Governor, they are compiled in the Revised Code of Washington, or RCWs. Rules to carry out those laws — often called regulations or WACs, for the Washington Administrative Code — are adopted by agencies through a process mandated in law by [Washington’s Administrative Procedure Act (APA)](http://apps.leg.wa.gov/RCW/default.aspx?cite=34.05).

Governor’s Office for Regulatory Innovation and Assistance

Rulemaking Process:

<http://www.oria.wa.gov/site/alias__oria/448/default.aspx>

Office of the Code Reviser

WA State Register Flowchart:

<http://leg.wa.gov/CodeReviser/Documents/registerflowchart.pdf>

# Accounting

**Resources, Guidelines, Policies**

## Administrative and Accounting Resources

The State Administrative & Accounting Manual, also known as SAAM, provides control and accountability over financial and administrative affairs of the state of Washington, and assists agencies in gathering and maintaining information needed for the preparation of financial statements.

The policies and procedures in this manual are the minimum requirements that state agencies must meet. An agency may adopt additional policies and procedures in greater detail as long as the agency meets the required minimum standards.

[SAAM Table of contents](https://ofm.wa.gov/accounting/saam/table-contents)

## [SAAM Forms and Templates by Topic](https://ofm.wa.gov/accounting/saam/forms-index)

## **Quick links to important topics for agencies to know:**

[Coffee and Light Refreshments](https://ofm.wa.gov/sites/default/files/public/legacy/policy/70.10.pdf)

[Inventories](https://ofm.wa.gov/sites/default/files/public/legacy/policy/35.10.pdf)

[Meals with Meetings](https://ofm.wa.gov/sites/default/files/public/legacy/policy/70.15.pdf)

[Moving Expense](https://ofm.wa.gov/sites/default/files/public/legacy/policy/ch60.pdf)

[Purchase cards](https://ofm.wa.gov/accounting/administrative-accounting-resources/purchase-cards)

[Risk Assessment](https://ofm.wa.gov/sites/default/files/public/legacy/policy/20.22.pdf)

[Small and Attractive Capital Asset - Risk Assessment Guidelines](https://ofm.wa.gov/sites/default/files/public/legacy/resources/capital_assets/CAsmallattract.pdf)

Travel

[Travel | Office of Financial Management](https://ofm.wa.gov/accounting/administrative-accounting-resources/travel)

[SAAM Chapter 10 - Travel](https://ofm.wa.gov/sites/default/files/public/legacy/policy/ch10.pdf)

[Quick Reference Guide: Internal policies for travel, transportation, and related policies](https://ofm.wa.gov/sites/default/files/public/resources/travel/TRQuickRefGuideTravel.pdf)

[Quick Reference Guide - Travel Do's & Don'ts](https://ofm.wa.gov/sites/default/files/public/legacy/resources/travel/Traveldodont.pdf)

[Frequently Used Travel Internet Sites](https://ofm.wa.gov/sites/default/files/public/legacy/resources/travel/TRInternetSites.pdf)

##

## Internal Control for Cash Receipts

The proper control of cash receipts is the responsibility of the agency director per [SAAM 20.15.30.a](http://www.ofm.wa.gov/policy/20.15.htm#20.15.30). This resource intends to aid an agency in understanding its risks and identifying applicable controls to minimize those risks.

General Guidelines

* Segregation of duties in the handling of cash is one of the most effective ways to gain control over this asset. No individual is to have complete control in the handling of cash. Specifically, no one individual’s duties should include the actual handling of money, recording receipt of money, and the reconciliation of bank accounts or with the state treasurer. Employees handling cash are to be assigned duties that are complementary to or checked by another employee.
* Incoming cash must be made a matter of record as soon as possible.
* A secure area is needed for the safeguarding and processing of cash received. Access to the secured area is restricted to authorized personnel only. The secured area is locked when not occupied.
* Cash is protected by the use of registers, safes, or locks, and kept in areas of limited access.
* Collections made over the counter or in the field are documented by the issuance of sequentially pre-numbered official receipts or through cash registers or automated cashiering systems. .
* The cash receiving function of an agency is centralized to the extent possible.
* Cash receipts retained on the premises overnight are minimized and locked up in a secure place, such as a safe.
* Cashiers are prohibited from cashing personal checks or notes of personal indebtedness.
* Written procedures on all cashiering and cash control processes are maintained by each agency and provided to SAFS.

## Agency Required Policies

The State Administrative and Accounting Manual (SAAM) requires agencies to have their own written internal policies, procedures, designations and/or documentation.

[Quick Reference Guide: Internal policies for capital assets, inventories, accounting, and other policies](https://ofm.wa.gov/sites/default/files/public/legacy/resources/misc/MCQuickReferenceGuide.pdf)

# Personnel (Human Resources) & Payroll

**Policies, Processes & Resources**

## Agency Policies & Procedures

Washington State Human Resources provides a list of required and optional rules for agencies. For more information see the [Washington State HR](http://www.hr.wa.gov/rules/Tools/Pages/Requiredandrecommendedagencypolicies.aspx) website or the Washington State Legislature for [WACs](http://apps.leg.wa.gov/WAC/default.aspx) and [RCWs](http://apps.leg.wa.gov/rcw/).

Why Policy!

In its simplest form, a policy is a written record of a workplace rule. They form the framework from which consistent decisions can be made across your agency. Benjamin Franklin said it best, "Honesty is the best policy." While that holds true, you do need a little more substance.

What do you need to do?

1. Find out what policies are [required and recommended by OFM State HR](http://ofm.wa.gov/state-human-resources/civil-service-rules/helpful-tools-related-civil-service-rules/required-and-recommended-agency-policies).
2. Create your own agency policy. If you would like to use a DES HR policy as a template, contact the DES HR Policy Coordinator.
3. Have your Management Team meet to review, discuss, and suggest edits.
4. If any edits are made, please send the draft to your Labor Relations Section Staff for their approval.
5. If your agency has represented employees, please refer to their Collective Bargaining Agreement for instruction on their notification process and time frame.
6. Once your Labor Relations Section Staff member and the union (if applicable) have approved the draft, the Agency Director should sign and approve it.
7. Forward a copy to Labor Relations Section Staff member.
8. Communicate the new policy to your staff.

Contacts

* Learn more at [Small Agency HR | Department of Enterprise Services (DES)](https://des.wa.gov/services/small-agency-support/human-resources/small-agency-hr)
* Phone: (360) 902-7490 | Mail Stop: 41414
* E-mail: SAA@des.wa.gov
* Learn more and find a link to forms at [Small Agency Payroll | Department of Enterprise Services (DES)](https://des.wa.gov/services/small-agency-support/financial-services/finance-toolkit)
* Phone: (360) 407-2239 | Mail Stop: 41465
* E-mail: DESPayroll@des.wa.gov

## New Hire Packet

Description

A packet containing information to get a newly hired employed enrolled in the state’s benefits programs and paid. The packet contains the following:

* Health, Life, Long-Term Disability, and Retirement forms and booklets
* Direct deposit form
* Miscellaneous information from the Health Care Authority
* Employment eligibility verification form (I-9)
* Federal Withholding Tax form (W-4)
* Retirement Status form
* PEBB Worksheet
* Emergency Contact Information
* Whistleblower Information
* Liaison Letter
* Employee Letter
* Children’s Health Insurance Program Notice (CHIP)
* Notice of the Benefit Exchange

\*This packet and its contents are subject to change

Agency Responsibilities

* Notify DES each time the agency hires a new employee.
* Have the new employee complete each form in the package that pertains to them.
* Confirm that each form is completed accurately.
* Send the completed forms, with the exception of the I-9 and emergency contact form to DES IMMEDIATELY, once you have received the forms from the employee. Keep the I-9 and emergency contact forms with the employee’s personnel file.
	+ Email to DESPayroll@des.wa.gov
	+ Fax to (360) 586-0021

Attn: *Payroll*

* + Mail to:

DES / *Payroll*

PO Box 41465

Olympia, WA 98504-1465

## Exit Checklist

State Ethics Law - Former State Employees

Former agency employees are subject to provisions of the state Ethics Law. The Ethics Law (RCW 42.52.080) limits employment and other activities of former employees as follows:

1. Within one year of termination, no employee may accept employment or compensation for an employer, if: 9a) the employee, during the two years immediately preceding termination negotiated or administered contract with that employer or was in a position to make discretionary decisions regarding the negotiation or administration of such contracts; and (b) such contract or contracts had a total value of more than $10,000, and (c) the former state employee's duties would include implementation of such contracts;
2. Within two years of termination, no employee may have a beneficial interest in a contract or grant expressly authorized or funded by specific legislative or executive action in which the former employee participated.
3. A former employee may not accept employment or receive compensation from an employer, if he or she knows, or has reason to believe that the offer is intended to influence the performance or nonperformance of the employee's duties while employed by the state.
4. A former employee may not accept employment or receive compensation from an employer, if the circumstances would lead a reasonable person to believe that the offer or compensation was given for the purpose of influencing the performance or nonperformance of the employee's duties while employed by the state.
5. A former employee may not assist another person in a transaction involving the state in which the employee participated while employed by the state.
6. A former employee may not accept employment or engage in any business or professional activity that the employee might reasonably expect would require or induce him or her to disclose confidential information acquired by reason of his or her official position.

The following items need to be completed prior to the departure of the employee:

* **Letter of resignation**: Ensure the letter references the effective date the employee will go off the agency’s payroll, the last working day if different from the effective date and the new agency the employee is going to, if applicable.
* **Personnel Payroll Data Sheet (PPDS)**
* **PEBB Worksheet**

**The final paycheck for employees who leave the agency to go to another state agency and employees terminating state service will be an actual warrant and will be mailed to the agency. If you are interested in making other arrangements for the final warrant, you must contact DES no later than two working days prior to payday.**

## Exit Checklist (Continued)

Eliminate Access

❑ Email (Network Access) ❑ Travel and Expense Management System

❑ Scheduler (Network Access) ❑ Mainframe Access

Please return the following equipment/supplies to the appropriate staff member. If you do not have the listed equipment, please indicate by marking “NA” in the box.

❑ Cellular Phone ❑ Files

❑ Laptop Computer (state tag #) ❑ Office Keys/Card Keys

❑ Laptop mouse, wiring, power cords, case ❑ Scan+ Card

❑ Pager ❑ Palm Pilot/Blackberry

❑ Parking Sticker/Pass ❑ Safety Kit

❑ Star Pass ($20 if not returned) ❑ Agency Credit Card(s)

❑ Software/Manuals

❑ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I have returned all of the above checked items.

Employee's Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Verified by (Supervisor) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Employee Assistance Program (EAP)

The Washington State [Employee Assistance Program (EAP)](https://des.wa.gov/services/employee-assistance-program) is a free, confidential program created to promote the health, safety and well-being of public service employees. When you're ready to get help, we're here for you.

**For Employees:**

EAP services for employees and their household adult family members help address work and personal concerns, including [counseling](https://des.wa.gov/services/employee-assistance-program/employees) and [work/life (legal and financial) resources](https://www.advantageengagement.com/1669/login_company.php).

**For Supervisors:**

AP services for supervisors, managers, and HR leaders, include organizational consultations, referrals, critical incident response, and tools for personal and professional development.

**For Providers:**

Our network of expert EAP providers across the state help provide convenient and accessible services to more than 110,000 eligible employees and their adult household family members.

**For Public Employers:**

EAP offers a full line of services to state agencies and other public service employers across the state on a contract basis. Contact us today for more information.

**Resources**

We provide resources for increasing awareness of EAP benefits, improving well-being, and knowing what to do during crises.

* [Webinars (live & on-demand)](https://des.wa.gov/services/employee-assistance-program/webinars)
* [Brochures, handouts & guides](https://des.wa.gov/services/employee-assistance-program/publications/brochures-posters-and-guides)
* [Informational resources](https://des.wa.gov/services/employee-assistance-program/resources)
* [Community resources](https://des.wa.gov/services/employee-assistance-program/useful-links)
* [Suicide prevention](https://des.wa.gov/services/employee-assistance-program/useful-links/suicide-prevention-and-intervention-resources)

**Contact**

In addition to our online request forms for employees and supervisors, you can call the EAP at 877-313-4455.

# Contracts and Procurement, Small Agency Support, Policies and Training

**Resources, Procedures, Contacts**

## Statewide Contracts

## Statewide contracts leverage the state’s collective buying power to help you save money, reduce risk, and streamline purchasing. Buy products and services directly from over 1,500 vendors.

Link to more information [How to Use Statewide Contracts | Department of Enterprise Services (DES)](https://des.wa.gov/purchase/how-use-statewide-contracts)

* Find goods and services on statewide contracts
* Sign up to use statewide contracts
* Make a purchase from a statewide contract
* Subscribe to statewide contract news
* Related laws

### Statewide Contracts Usage Agreement Service Desk

Phone 360-407-2210

Email cua@des.wa.gov

## Purchase Cards

## A purchase card allows you to pay vendors and suppliers quickly, protects your agency from fraudulent spending, and earns rebates throughout the year.

Link to more information [Purchase Cards | Department of Enterprise Services (DES)](https://des.wa.gov/purchase/purchase-cards)

* Annual purchase card forum
* Benefits of using a purchase card
* Professional association membership
* Start a purchase card program
* Related policies
* Contacts

## Fleet Cards

## Use a fleet card to simplify fuel expense tracking and make buying fuel and vehicle repairs easy if you drive or lease a vehicle from the state's fleet.

Link to more information [Fleet Cards | Department of Enterprise Services (DES)](https://des.wa.gov/purchase/fleet-cards)

* Benefits of using a fleet card
* Get a fleet card
* Earn rebates with your fleet card
* Fees
* About the contract
* Contacts

## Washington State Procurement Manual

## The Washington State Procurement Manual helps public procurement professionals use and manage contracts on behalf of their organizations. The tools and templates help agencies comply with state procurement laws and policies.

Links to the manual [Washington State Procurement Manual | Department of Enterprise Services (DES)](https://des.wa.gov/purchase/washington-state-procurement-manual)

* [Laws and policies](https://des.wa.gov/purchase/washington-state-procurement-manual#LP)
* [Resources for agencies and purchasers](https://des.wa.gov/purchase/washington-state-procurement-manual#AR)
* [Purchasing methods process charts](https://des.wa.gov/purchase/washington-state-procurement-manual#PMPC)
* [Statewide contracts](https://des.wa.gov/purchase/washington-state-procurement-manual#SC)
* [Considerations for all purchases](https://des.wa.gov/purchase/washington-state-procurement-manual#CAP)
* [Climate Commitment Act branding](https://des.wa.gov/purchase/washington-state-procurement-manual#CCA)
* [Competitive procurement](https://des.wa.gov/purchase/washington-state-procurement-manual#CP)
* [Competitive procurement exceptions](https://des.wa.gov/purchase/washington-state-procurement-manual#CPE)
	+ [Sole source](https://des.wa.gov/purchase/washington-state-procurement-manual#SS)
	+ [Direct buy](https://des.wa.gov/purchase/washington-state-procurement-manual#DB)
	+ [Emergency contracts](https://des.wa.gov/purchase/washington-state-procurement-manual#EC)
	+ [Inter-agency agreements](https://des.wa.gov/purchase/washington-state-procurement-manual#IA)
	+ [Client services](https://des.wa.gov/purchase/washington-state-procurement-manual#CS)
* [Convenience contracts](https://des.wa.gov/purchase/washington-state-procurement-manual#CC)
* [Contract management](https://des.wa.gov/purchase/washington-state-procurement-manual#CM)
* [Procurement guidance/FAQ](https://des.wa.gov/purchase/washington-state-procurement-manual#PGFAQ)

## Small Agency Contracts and Procurement Support

## We help small agencies, boards, and commissions with contracts and procurement services. We help these agencies follow procurement laws and best practices to minimize their risk.

We can help with:

* Conducting and managing competitive procurements.
* Buying from a statewide contract.
* Using direct buy purchasing authority.
* Using and substantiating the need for sole source contracts.
* Assisting with the agency procurement risk assessment.

Link to more information [Contracts and Procurement Support | Department of Enterprise Services (DES)](https://des.wa.gov/services/small-agency-support/contracts-and-procurement-support)

* Use our services – Procurement service request form
* Related policies

### Small Agency Procurement Support Services

Phone 360-407-2209

Email DESProcurementConsulting@des.wa.gov

## DES Contracts and Procurement Training

Washington state government employees must complete specific trainings before they manage contracts. Find out which trainings are required and recommended based on your job duties.

Link to more information [DES Contract and Procurement Training | Department of Enterprise Services (DES)](https://des.wa.gov/services/training/des-contract-and-procurement-training)

* New required contract and procurement trainings
* Three steps for purchasing in Washington State
* Required training by job duties

### Contracts and Procurement Training team

Email DESmiLMSContractTraining@des.wa.gov

## Policies, Laws & Rules Search – “Procurement”

Scroll through all policies, laws, and rules related to DES. Use the type, status, and keyword filters for a specific search.

Link to search results [Policies, Laws & Rules Search | Department of Enterprise Services (DES)](https://des.wa.gov/policies-legal/policies-laws-rules-search?combine=procurement)

# Ethics, Whistleblower Program, Open Public Meetings

**Policies and Resources**

## Ethics in Public Service Act

**Background**

The [Executive Ethics Board | Washington State Executive Ethics Board](https://ethics.wa.gov/) was created by chapter 42.52 RCW in 1995 to enforce the state's ethics law and rules adopted under it with respect to statewide elected officers and all other officers and employees in the executive branch, boards and commissions, and institutions of higher education.

The Board is comprised of five members appointed by the Governor for five-year terms. Two of the five members must be current state employees; one an exempt employee and one a classified employee. One of the remaining three members of the Board is selected from names provided by the State Auditor’s Office, one from names provided by the Attorney General’s Office and one is a citizen-at-large. Except for initial members and those completing partial terms, members serve a single five-year term. The members play a crucial role in the policy setting and enforcement of the Ethics Act.

**Policy Review**

Under [RCW 42.52.360(4)](http://app.leg.wa.gov/RCW/default.aspx?cite=42.52.360) and [WAC 292-120-035](http://app.leg.wa.gov/wac/default.aspx?cite=292-120-035), the Board may review and approve agency policies. When determining an appropriate sanction for violations of the Act, the Board may consider agency policies in effect at the time of the conduct and will not impose sanctions for conduct that would violate the Act if the conduct at issue was permitted under a board-approved agency policy. For all Board approved policies, [go here](https://ethics.wa.gov/advisories/agency-policy-reviews).

## Laws & Rules Governing the Ethics in Public Service Act

**Laws**

* [RCW 42.52](http://apps.leg.wa.gov/RCW/default.aspx?cite=42.52), Ethics in Public Service

**Rules**

* [WAC 292-100](http://apps.leg.wa.gov/WAC/default.aspx?cite=292-100), Procedural Rules
* [WAC 292-110](http://apps.leg.wa.gov/WAC/default.aspx?cite=292-110), Substantive Rules
* [WAC 292-120](http://apps.leg.wa.gov/WAC/default.aspx?cite=292-120), Penalty Rules
* [WAC 292-130](http://apps.leg.wa.gov/WAC/default.aspx?cite=292-130), Public Record and Agency Organization Rules

## Ethics Brochures & Training

[**www.ethics.wa.gov**](http://www.ethics.wa.gov)

**Brochures**

In an attempt to answer questions that state employees may have regarding the Ethics in Public Service Act, the following brochures have been developed and are available for download:

* [New State Employee Guide](https://ethics.wa.gov/sites/default/files/public/documents/brochures/New%20Employee%20Guide_2014.pdf) (PDF)
* [Ethics in Public Service Brochure](https://ethics.wa.gov/sites/default/files/public/documents/brochures/Ethics%20in%20Public%20Service_2014.pdf) (PDF)
* [Can I Accept a Gift Brochure](https://ethics.wa.gov/sites/default/files/public/documents/brochures/Can%20I%20accept%20the%20Gift_2014.pdf) (PDF)
* [Post-State Employment Brochure](https://ethics.wa.gov/sites/default/files/public/documents/brochures/Post-State%20Employment._2014doc.pdf) (PDF)
* [Filing a Complaint Brochure](https://ethics.wa.gov/sites/default/files/public/Filing%20a%20Complaint_2021.pdf) (PDF)

**Training** [Training | Executive Ethics Board (wa.gov)](https://ethics.wa.gov/training)

Executive Level Training

Intended for agency heads, commissioners, presidents, vice presidents, and cabinet level leaders. To schedule, please call (360) 586-6759.

### Webinar Training or In-Person Training

Gain a basic understanding of the ethical standards in place for state employees and state officials. Training can be customized in both content and length depending upon your preference. If interested in setting up a webinar or in-person training, contact Ethics Board staff at ethics@atg.wa.gov or by calling (360) 664-0871.

## Whistleblower Program

The Whistleblower Act, enacted by the Washington State Legislature in 1982 and amended in 1999 and 2008, provides an avenue for state employees to report suspected improper governmental action ([Chapter 42.40 RCW](https://app.leg.wa.gov/rcw/default.aspx?cite=42.40)).

The Legislative intent is to encourage state employees to report improper governmental actions. The law makes retaliation against people whose assertions result in a whistleblower investigation unlawful and authorizes remedies should it occur. The State Auditor’s Office is responsible for investigating and reporting on assertions of improper governmental action.

Improper governmental action ([RCW 42.40.020(6)(a)](https://app.leg.wa.gov/RCW/default.aspx?cite=42.40.020)), is defined as any action by an employee undertaken in the performance of the employee’s official duties which:

• Is in violation of federal or state law or rule, if the violation is not merely technical or of a minimum nature

• Is a gross waste of public funds or resources

• Is of substantial and specific danger to the public health or safety

• Is gross mismanagement

• Prevents dissemination of scientific opinion or alters technical findings

• Using a state computer or email for a private business

[State Auditor’s Office Whistleblower Program](https://www.sao.wa.gov/report-concern/how-report-concern/whistleblower-program)

[Whistleblower FAQ](https://www.sao.wa.gov/report-concern/how-report-concern/whistleblower-faqs)

## Open Public Meetings Act

The legislature passed legislation that requires all public commissions, boards, councils, committees, departments, offices, and all other public agencies of this state to take actions openly and intends that their deliberations be conducted openly.

RCW 42.30 – Open Public Meetings Act

<http://app.leg.wa.gov/rcw/default.aspx?cite=42.30>

**More Information**

Training and additional resources about open public meetings and records is available on the Office of Attorney General website at the link below.

<http://www.atg.wa.gov/open-government>

## Questions to Ask when Preparing for a Meeting

General

* What is the purpose of the meeting?
* Can the agency absorb all costs associated with the event?
* Have you followed the requirements established in your Light Refreshment policy?
* Is the event provided by another state agency at a lower cost?

Location

* What city?
* Are there state facilities available? If so, who do I contact, and when? [SAAM 10.10.55](http://www.ofm.wa.gov/policy/10.10.htm)
* If no state facilities are available, will the hotel where the attendees are staying give the agency a free or reduced rate on a conference room? [SAAM 10.10.55](http://www.ofm.wa.gov/policy/10.10.htm)

Attendees

* Who? (Agency staff, commissioners, presenters, public)
* How many?
* Will they require overnight lodging? [SAAM 10.30.25](http://www.ofm.wa.gov/policy/10.30.htm)
* What is the maximum amount allowable per person per night?
* How will they get there? (Airplane, personal vehicle, or rental car)
* Will guest speakers be present?
* Will the agency have to pay the guest speaker(s)?
* Will you need to prepare a contract for the guest speaker(s)?

Food

* Can the agency pay for all of the attendees’ meals?
* What is the maximum amount allowable per person per meal?
* How many meals are being provided?
* Who will receive these meals?
* Are you planning to serve light refreshments to all attendees? [SAAM 70.10](http://www.ofm.wa.gov/policy/70.10.htm)
* Will the agency staff be eligible for the meal? [SAAM 70.15](http://www.ofm.wa.gov/policy/70.15.htm)
* Did you document the request and prior approval for coffee/light refreshments and/or meals? [SAAM 70.10.40](http://www.ofm.wa.gov/policy/70.10.htm)