

# Bladen Community College

# Purchasing Manual

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# BLADEN COMMUNITY COLLEGE PURCHASING MANUAL

## FOREWORD

I begin by thanking the college's business office and everyone involved for their efforts in the development of this manual and for inviting this Foreword.

The intent of this manual is to assist personnel with Bladen Community College's Purchasing Procedures. These guidelines apply to those responsible for and those intending to purchase with state, county, institutional, and federal monies.

The Bladen Community College (BCC) Purchasing Manual sets forth the policies and procedures to be followed by Bladen Community College personnel in fulfilling their procurement responsibilities within delegated limits. This edition of the BCC Purchasing Manual is effective October 1, 2011, and supersedes all previous editions.

Please address comments, suggestions, or questions of interpretation to the Business Office or me.

Thank you,

A handwritten signature in cursive script that reads "Jay H. Stanley". The signature is written in black ink and is positioned above the printed name and title.

Jay H. Stanley  
Vice President for Finance

# INTRODUCTION

This manual is intended to provide you with the general rules needed to prepare a purchase requisition. It applies to the acquisition of all equipment, materials, supplies, printing, and services, through outright purchase, rental, lease, or lease-purchase.

All community colleges are required by General Statute 115D-58.5 to purchase all supplies, equipment and materials by contracts made by or with the approval of the Division of Purchase and Contract (P&C) of the Department of Administration.

The State's purchasing program is based on sound competitive purchasing procedures. The importance of seeking competition exists at all levels of expenditure. Fostering competition is an attitude more than a procedure. It is reflected in the way specifications are written, in searching for new sources of supply, in attempting to make procurement documents simple and inviting, and in everyday courtesousness shown to prospective suppliers and contractors. Where competition is not sought or obtained, the reason must be valid and documented.

Price is not the only consideration in seeking competition. Other factors include: terms and conditions, delivery schedules, lead times, types and degrees of service required, inspection and testing procedures, transportation and delivery costs, warranties and guarantees required, etc.

Price is only one factor considered  
in seeking competition.

## DEFINITIONS

AGENT: A person who, by expressed or implied agreement, is authorized to act for the institution in business dealings with a third party.

AGREEMENT: (“meeting of the minds”) resulting from an offer and an acceptance.

ARIBA: This is the provider that provides the base software for the NC E-Procurement Service.

BENCHMARK: the maximum authorized dollar amount set by the State of NC for State agencies.

BUYER: Authorized agent of the institution to buy, purchase or enter into contract with a supplier.

COMMODITIES: Any like group of equipment, materials, or supplies.

COMPETITION: The fair and open solicitation of offers from more than one source; the receipt of offers from more than one qualified source.

CONVENIENCE CONTRACT: This a contract for items generally needed by one or more state agencies. These contracts are not mandatory contracts.

EMERGENCY: A situation which endangers lives or property and which can be rectified only by immediate on-the-spot purchase (or rental) of equipment, supplies, materials, printing, or contractual services.

E-PROCUREMENT: Electronic online purchasing of goods and services by selecting from online catalogs and submitting the order for approvals and then on to the vendor.  
<http://eprocurement.nc.gov/index.html>.

EP User: a person trained in the E-Procurement system that is allowed to enter requisitions for submission into a purchase order.

EP Vendor: a vendor who is registered with the NC E-Procurement System and can receive purchase orders and EQuotes through this system.

EQUIPMENT: An item that represents an investment of money that can be capitalized. The “stand-alone” item retains its original shape and appearance with use and does not lose its identity through the incorporation into a different or more complex unit or substance.

The State categorizes a piece of equipment as being one single item totaling over \$1000 per item, all in-cost, which includes purchased price, applicable tax and shipping charges.

BCC separates equipment into 2 categories:

1. Major Equipment = over \$1000 for each individual item
2. Minor Equipment = under \$1000 for each individual item

**HISTORICALLY UNDERUTILIZED BUSINESS (HUB)**: A business that falls into anyone of the following categories: minority-owned, female-owned, disabled-owned, disabled business enterprise or a non-profit workshop for the blind or severely disabled.

**INFORMATION TECHNOLOGY (IT)**: Electronic data processing goods and services and telecommunications goods and services, microprocessors, software, information processing, office systems, any services related to the foregoing, and consulting or other services for design or redesign of information technology supporting business processes.

**INVITATION FOR BIDS (IFB FORM)**: A solicitation document used for purchases of commodities costing over \$10,000.00.

**FREIGHT ON BOARD (FOB)**: The FOB determines how freight charges for your order will be paid. The state's term mandates that BCC use "FOB Destination". Freight charges will be paid by vendor to BCC's in Dublin, North Carolina, or other locations as specified on the purchase order.

**LEASE**: A contract conveying use of a commodity for a designated period of time in return for established periodic payments.

**LEASE-PURCHASE**: (Conditional Sales Contract) A contract in which the established periodic payments are applied to fulfill the payment obligations for ownership of the commodity.

**NEGOTIATION**: The act of making a purchase, lease, lease-purchase, or rental agreement, by an authorized agent of the institution under the following conditions:

- When all offers have been rejected,
- When the use of the standard solicitation document is not appropriate,
- Where there is a sole source,
- When an emergency or pressing need arises.

**OFFER**: The term may refer to a proposal, quote, or bid submitted in response to a Request for Proposal, Request for Quotation, Invitation for Bid, or Negotiation.

**OPEN MARKET CONTRACT**: A contract for the purchase of a commodity or contractual service not covered by a term contract.

**PRESSING NEED**: A need arising from unforeseen causes including, but not limited to, delay by contractors, delay in transportation, breakdown in machinery, or unanticipated volume of work, and which can be rectified only by immediate on-the-spot purchase (or rental) of equipment, supplies, materials, printing, or contractual services.

**PURCHASE**: The act of acquiring a needed item or service by an authorized agent of the institution. The acceptance of an offer to sell, lease, lease-purchase, or rent. An item or contractual service acquired as a result of a valid agreement between an authorized agent of the institution and a seller.

RENTAL: A contract for the right to use a commodity for a period of time, usually with payments made at intervals over the period of use, and normally providing for short notice of cancellation.

REQUEST FOR PROPOSALS: An alternate acquisition method to the IFB. Customary to use for quotations for services.

REQUEST FOR PROPOSAL FORM (RFP FORM): A solicitation document generally used to obtain bids for services.

REQUEST FOR QUOTE (RFQ): A solicitation document normally used for smaller, non-advertised competitive procurements.

SOLE SOURCE: When an item or service is available from only one source.

STATEWIDE TERM CONTRACT: A term contract handled by the Division of Purchase and Contract for all agencies and institutions of the state, unless exempted by statute, rule, or special terms and conditions specific to the contract.

TERM CONTRACT: A contract generally intended to cover all normal requirements for the commodity or contractual service, for a specified period of time, based on estimated quantities only. Sometimes referred to as “contract”, “requirements contract”, or “indefinite quantity contract”.

## ACRONYMS AND ABBREVIATIONS

|                |                                     |
|----------------|-------------------------------------|
| <b>ARO</b>     | After receipt of order              |
| <b>EOQ</b>     | Economic Order Quantity             |
| <b>FOB</b>     | Freight On Board                    |
| <b>HUB</b>     | Historically Underutilized Business |
| <b>IFB</b>     | Invitation for Bids                 |
| <b>P&amp;C</b> | Purchase and Contract Division      |
| <b>PO</b>      | Purchase Order                      |
| <b>PSA</b>     | Professional Services Agreement     |
| <b>QPL</b>     | Qualified Products List             |
| <b>REQ</b>     | Requisition                         |
| <b>RFP</b>     | Request for Proposals               |
| <b>RFQ</b>     | Request for Quotes                  |
| <b>RMA</b>     | Return Materials Authorization      |
| <b>SC</b>      | State Contract                      |
| <b>SOW</b>     | Scope/Statement of Work             |
| <b>SPO</b>     | State Purchasing Officer            |
| <b>U/M</b>     | Unit of Measure                     |

# PURCHASING BEHAVIOR

Ethical practices are a major concern in the realm of public purchasing. While laws and rules mesh to provide a mechanism for public purchasing, only people can make it work. Impediments to the process must be detected early and safeguards provided at all levels.

## ETHICS

All public purchasing personnel shall be cognizant of the necessity for ethical behavior.

Everyone<sup>1</sup> involved in the purchasing process is held accountable to the following principles and standards of purchasing practice:

1. The purchasing power of the State shall not be used for private advantage or gain<sup>2</sup>. Employees or other individuals will not process institutional orders for personal ownership.
2. Avoid the intent and appearance of unethical or compromising practice in relationships, actions, and communications.
3. Refrain from any private business or professional activity that would create a conflict between personal interests and the interests of the institution.
4. Refrain from soliciting or accepting money, loans, credits or prejudicial discounts and the acceptance of gifts, entertainment, favors, or services from present or potential suppliers which might influence, or appear to influence purchasing decisions.
5. Do not discuss with suppliers: cost information, bid information or trade secrets. Handle all information of a confidential or proprietary nature with due care and proper consideration of ethical and legal ramifications and governmental regulations.

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<sup>1</sup> “Everyone” involved in the purchasing process applies to every person who engages with a supplier at any level, for any reason. This includes, but is not limited to: requests for products information, inquiries into pricing, design, repairs, replacements, quote information or generating a requisition for purchase.

<sup>2</sup> “Private advantage or gain” refers to using the association of the State or BCC to receive products, favors, services, or discounts for personal use.

## INTEGRITY

Fairness and impartiality in all phases of the process are an essential ingredient in public purchasing. Integrity is manifested through fairness, openness, honesty, objectivity, and impartiality.

Similar to other service organizations, the purchasing department's justification is the quality of the service it renders. The purchasing process cannot be both effective and self-serving; the two are incompatible. Fairness is required in expending public funds. No matter how strongly a user may prefer a particular product or service to others, equivalent products and services must be given every reasonable consideration.

## RESPONSIBILITY

According to statute, if any institution contracts for the purchase or lease of any commodities, printing or services *contrary to statutes or rules*, such contract/purchase shall be void and of no effect.

If any unauthorized agent of an institution contracts for the purchase or lease of any commodities, etc., such contract shall be void and of no effect.

**In addition, anyone making such illegal purchases is personally liable for the costs incurred.**

## **CORRECTION ENTERPRISES**

(<http://www.doc.state.nc.us/eprise/products>)

The North Carolina General Statutes gives preference to Correction Enterprises for the items and products manufactured by them. This means that Correction Enterprises will be given priority over all other vendors, including state contract vendors. Items that are available from Correction Enterprises can be found on their website at <http://www.doc.state.nc.us/eprise/products>. Some of the items offered by Correction Enterprises are wooden furniture such as desks and bookcases, chairs, tables, janitorial supplies, oils, paints, and safety supplies.

When a need arises in your department, you should check the products at Correction Enterprises first. If they have similar items, contact them for samples or additional information. If the items they offer do not meet your needs, you are to request and receive a certificate of waiver from them stating that they could not meet your needs.

If you cannot purchase the needed item from Correction Enterprises, you are to note on your requisition that you contacted Correction Enterprises and that they could not provide a suitable item. You are also to attach the certificate of waiver to your requisition.

Your next step will be to check to see if your item(s) is on state contract. Term contracts can be found on the State Purchase and Contract website at:

<http://www.doa.state.nc.us/PandC/StateWideContracts.htm>.

If your item(s) is on state contract, note the contract number on your requisition, along with other required information and then submit your requisition to the College Purchasing Officer to be processed.

## USING STATE TERM CONTRACTS

A "**term contract**" is a contract intended to cover all normal requirements for a commodity, printing, or contractual service for a specified period of time based on estimated quantities only. It is also referred to sometimes as a "requirements contract" or "indefinite quantity contract".

There are two basic types of term contracts:

1. "**Statewide term contract**" that is handled only by P&C, which is for all agencies;
2. "**Agency specific term contract**" that an agency may handle for use by their agency if the commodity, printing or service is not covered by a statewide term contract and the contract value does not exceed their delegation.

Most of the statewide term contracts for commodities list a **minimum** and **maximum** quantity (or dollars). Orders under the **minimum** quantity gives the agency more flexibility as to how to obtain what is needed. Orders that exceed the **maximum** quantity must be forwarded to P&C for handling. For needs that exceed the maximum, P&C will determine if the order should be placed with the contractor at the contract price, negotiate the price with the contractor, or solicit new offers for the requirement. In all cases, follow the instructions, which will vary by contract, or call the P&C purchaser for guidance.

If a **waiver, emergency purchase** or **pressing need** arises, a term contract supplier should be given the opportunity to satisfy the requirement, if the requirement is covered by a term contract and time permits such action. <sup>3</sup>

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<sup>3</sup> NC Department of Administration-Division of P and C, "Agency Purchasing Manual," V-4 Term Contracts, n.d.,  
< <http://www.pandc.nc.gov/QuickReference.html> > (September 2011)

## BASICS ON NC STATE TERM CONTRACTS:

The most basic items you will need are found on the NC State Term Contracts. The State of NC has done all the work for you! **These contracts should be the first source of supply after checking Correction Enterprises for any item that is on contract.** Any item available on state contract has been through a formal bidding process with State Purchase and Contract, no bids or quotes are required. If you choose not to use someone on state contract, then you must follow the guidelines for Non-State purchasing (see page 10).

BCC, as a rule, does not exercise the flexibility given to community colleges by GS115. Time is required to handle additional bids, quotes, etc and to track potential savings. This is a costly process in time and soft dollars. However, in the event that the requisitioner can provide written comparison documentation of the exact item(s) needed from a supplier versus the price of that exact item on state contract, the College Purchasing Officer will give consideration based on the documented potential for savings. If the documented savings are deemed to warrant additional work, the purchase from a non-state contract item/vendor will be given consideration. The College Purchasing Officer will make this determination based on cost versus benefit.

**Shipping should be included in the price when items are listed on State Contract.**

You can search for these items by going to <http://www.doa.state.nc.us/PandC/index.html> and clicking on the left side NC E-PROCUREMENT AT YOUR SERVICE/click “ok”/VIEW STATE TERM CONTRACTS. These contracts must be used. Products are on contract, not suppliers. However, equipment or supplies listed on state contract must be purchased from vendors listed on the contract in accordance with state law.

From here you will be able to type in an item in “keywords” and the item, price, vendor, etc will appear.

For example: You need to buy a filing cabinet. Type in “filing cabinet” and click SEARCH. Scroll down and you will be able to see all filing cabinets that are listed on the NC State Term Contract.

There are some contracts that contain so many items that loading all of these in the E-Procurement system would slow down the system. In these cases, the State of NC has made it possible for you to “punchout” to the vendor’s catalog where the items are listed. These are called “punchout catalogs”.

Office supplies fall into the category of “punchout catalogs”. If you are looking for a “pen” then you can type the word “pen” in the keywords blank **or** you could type “office supplies”. This will not bring up all PENS on the state contract but will bring up the vendors catalogs. From there you will click on **VIEW SUPPLIER CATALOG**. You can search for the items you need and the prices.

If you want to see all of the NC State Term Contracts go back to the website <http://www.doa.state.nc.us/PandC/index.html> and on the left side click on TERM CONTRACTS. From there you will be able to view the contracts alphabetically or numerically.

The Administrative Assistant in your area can help with these searches and place orders through the E-Procurement system for items on the NC State Term Contracts.

# BUYING ITEMS THAT ARE NOT ON STATE TERM CONTRACTS

CHOOSE THE CATEGORY THAT FITS YOUR PURCHASE:

**DETERMINATION OF BID REQUIREMENTS:** No matter what the total dollar amount is on a requisition, the end user must first check to see if the merchandise is available from Correctional Enterprises or is listed on state contract. If the merchandise is not available from either source, then the following bid requirements must be followed.

**Shipping is usually included on items ordered that are not on state contract.**

## **COST UNDER \$5000 (NOT INCLUDING TAX)**

If you are purchasing an item that is not on a State Contract and the total cost (including freight) is under \$5000, you are not required to get bids. However, as a general rule it is always best to seek competition in all purchases. If you have contacted other vendors **be sure to include three informal quotes that may have been given**. If you received a quote over the telephone make sure to document the vendor's name and amount. Attach all of this information to your requisition for general audit purposes.

**You may not split the order to avoid getting bids.**

## **COST \$5001 - \$10,000 (NOT INCLUDING TAX)**

Any order that is between the cost of \$5001 - \$10,000 should be discussed with the College Purchasing Officer first. Many rules apply to these purchases. Once it is determined that this purchase needs bids, the College Purchasing Officer should have three written bids on a **RFQ** form (<http://www.pandc.nc.gov/divforms.htm>) that include the proper written verbiage and the specifications needed. All paperwork must be submitted to the College Purchasing Officer to be filed for audit purposes. You will need to submit your written specifications and all other information deemed necessary before the College Purchasing Officer can complete this process. The actual bidding process can take up to three weeks.

(See – The Bid Process p.13)

Once the bidding process is complete you will be given an opportunity to review the bids and make a determination as to which vendor will be awarded.

**You may not split the order to avoid getting bids.**

Under certain circumstances, you can skip the bid process by using a “[waiver of competition](#)” (see next page) as justification. These are not to be used to avoid the bidding process. The particular “waiver of competition” that is chosen must be justified in writing and attached to the order.

## **COST \$10,001 +**

Any order that costs over \$10,001 must be submitted to the NC Department of Administration, Division of Purchase & Contract in Raleigh for formal written bids. They will post the information on their website using an RFP form, RFQ form or IFB form (see definitions for form descriptions). Bids will be returned to the College for review of specifications and our recommendation for award. Again, please provide complete specifications and a listing of suggested vendors. They will obtain the bids from your specifications. **IT IS YOUR RESPONSIBILITY WHEN YOU REVIEW BIDS TO MAKE SURE THE ITEM YOU RECOMMEND FOR PURCHASE MEETS THE SPECIFICATIONS REQUESTED.**

**NOTE: Purchases cannot be divided in order to keep them under the established dollar increment or to avoid the bid process. When obtaining quotes, never imply to a supplier that they will get the business. Always refer your suppliers to the College Purchasing Officer if they have questions concerning the bid/quote process. The final decision for any purchase is made by the College Purchasing Officer, Vice President for Finance, and the President, or the Division of Purchase and Contract.**

# WAIVER OF COMPETITION

## WAIVER OF COMPETITION:

Under certain conditions, and otherwise if deemed to be in the public interest, competition may be waived. Conditions permitting waiver include, but are not limited to, the following:

1. Cases where performance or price competition are not available;
2. Where a needed product or service is available from only one source of supply;
3. Where emergency or pressing need is indicated;
4. Where competition has been solicited but no satisfactory offers received;
5. Where standardization or compatibility is the overriding consideration;
6. Where a donation predicates the source of supply;
7. Where personal or particular professional services are required;
8. Where a particular medical product or service, or prosthetic appliance is needed;
9. Where a product or service is needed for the blind or severely disabled and there are overriding considerations for its use;
10. Where additional products or services are needed to complete an ongoing job or task;
11. Where products are bought for "over the counter" resale;
12. Where a particular product or service is desired for educational, training, experimental, developmental or research work;
13. Where equipment is already installed, connected and in service, and it is determined advantageous to purchase it;
14. Where items are subject to rapid price fluctuation or immediate acceptance;
15. Where there is evidence of resale price maintenance or other control of prices, lawful or unlawful, or collusion on the part of companies which thwarts normal competitive procedures;
16. Where the amount of the purchase is too small to justify soliciting competition or where a purchase is being made and a satisfactory price is available from a previous contract;
17. Where the requirement is for an authorized cooperative project with another governmental unit(s) or a charitable non-profit organization(s);

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<sup>4</sup> NC Department of Administration-Division of P and C, "Agency Purchasing Manual," V-5 Waivers and Emergencies, n.d., < <http://www.pandc.nc.gov/QuickReference.html> > (September 2011)

## **PURCHASING THROUGH THE DIVISION OF P&C**

(Purchases over \$10,001)

The decisions for purchases under \$10,000 are left to Bladen Community College. However, once you go over that “benchmark” amount the State of NC will take over the bidding process. Remember if you are making the purchase from the NC State contracts then you do not have to get bids so this process is only when the items are not found on the NC State Contracts. This process can take anywhere from 30-90 days depending on the complexity of the purchase and the amount of people that need to be involved. The Division of Purchase and Contract does the purchasing for all State Agencies and has their busy times as well, so you will have to allow some time for them to complete their process.

The first step is to know what you are buying and having a written specification sheet that will describe exactly what is needed for the purchase. The College Purchasing Officer can help with this process but you are the only one who knows exactly what is needed for your area.

Once that is written you must have an approved request that states Bladen Community College will be able to make this purchase and has funds available when the bid process is over. This must be written by the Vice President of your area on Bladen Community College letterhead.

The bid process at P&C is basically the same as noted on page 15, except once you submit your specification sheet to P&C they post your specifications and your solicitation document on their website. It can be viewed and bid by any vendor that can meet the qualifications.

If it is determined that a site visit is necessary then everyone who will be involved in the use and purchaser of the equipment must attend the scheduled visit. The date, time and exact location is set by Bladen Community College and is posted in the solicitation document. If this visit is mandatory, all vendors who plan on submitting a bid must be present for the complete site visit and must arrive on time. If a vendor is late, they can attend the site visit but their bid will not be accepted and they cannot participate in the site visit by asking questions or making comments. If a vendor submits a bid and has not attended a mandatory site visit the bid is not accepted.

When the bid opening day arrives the state of NC will formally open the bid packages they received from the vendors in Raleigh. They will announce the vendors name and the total costs. As soon as possible they will forward all of the information to Bladen Community College and the College Purchasing Officer will meet with you to determine who will be awarded the bid.

Most of the time the lowest, responsible bid is accepted but all factors are used in determining the awarded vendor. A justification is written to explain the awarded vendor and submitted back to the Administrator in the Division of P&C in Raleigh. Once they receive the formal written justification the Administrator presents it to the Board of Awards. The Board of Awards meets every Thursday. The Board of Awards will either approve or disapprove your suggested award. Once you receive notification of the approval a purchase order can be processed to the vendor.

## THE BID PROCESS

Once you have determined that your purchase will require at least 3 bids, (Under \$10,000, tax is not to be included in the determination) you will need to write a specification sheet that can be attached to the bid documentation. This specification sheet will explain in detail the description of the items or services needed. It is best not to be “brand specific” so as not to limit the options, but it is ok to reference a particular brand so that vendors will know what you are wanting.

You may find that you “don’t know what you want” without asking an expert. It is acceptable to have a vendor that is willing to do a quote or estimate before you write your specification sheet. Be sure to find out if there is a charge for this service before they arrive. If there is you are required to have written approvals to make this “purchase” beforehand.

The “expert” must be informed that the purchase will go through the bid process and they are welcome to place a bid as any other vendor would do. It is important to ask questions through that process so that you will be able to write the specification sheet to determine if the purchase meet the needs of Bladen Community College.

It is important to know your timeframe through the entire process. How much time do you have before you need your items or service? It is important that the College Purchasing Officer understand when the purchase is needed. True emergencies may take precedence over non-emergencies. However, too many “emergencies” for the same department will be subject to review by the business office.

You will need to make sure your specification sheet includes all details. The better you inform the vendor of what you are wanting the better bid you will receive. Your decisions will be easier in the end because you will be able to compare the bids. Take the necessary time to ensure that your specification sheet is in good order. This information must be typed in a Word document and emailed to the College Purchasing Officer so that it can be electronically attached to the bid.

Once the specification sheet is complete you will need to work with the College Purchasing Officer to find vendors who can provide the products and/or services that you need. These must be selected from the NC E-Procurement registered vendors. The purchase order will go to the vendor through the EP system and they must be registered. The College Purchasing Officer can do a search on the particular service or commodity you are buying to come up with a list of vendors, but you must be able to provide some insight on any vendors that are interested in bidding or that may be able to bid.

**Any order over \$10,001 and not listed on state contract must be submitted through the NC Department of Administration, Division of Purchase & Contract in Raleigh.**

If it is determined that it is advantageous for the vendor to see the location of the intended equipment, installation, service, etc. then a “site visit” must be set and the date, time, and location must be posted in the documentation. When a particular time is set the vendors cannot be late. Lateness is determined by the time device of the College Purchasing Officer and the initiator. Late is considered one minute after the set time. No exceptions. However, if the “site visit” is not mandatory then a vendor is not required to attend. Sometimes the wording “urged and cautioned” will be used to explain the site visit. This will mean that it is not a mandatory visit, but Bladen feels like it is necessary that the vendor be aware of the entire location and situations.

The bid time must include at least one week for the vendor to submit a bid. If you need to have a “site visit” or the bid is more complicated then you will need to give the vendor at least two weeks. The deadline for receiving bids is called the “bid opening day”. On this day the bids will be viewed. No one can submit a bid after the deadline. These are considered late bids and will not be accepted. No exceptions.

You will be asked to meet with the College Purchasing Officer to review the bids **as soon as possible** after the “bid opening date”. You will not be allowed to discuss any information except with the persons solely involved in the decision making process. This information you will review will be confidential until after the decision is made and the awarded vendor is notified. At that time the records and documentation become a matter of public record.

Once a vendor is selected the College Purchasing Officer will contact the vendor and let them know of the award. If this process was submitted through the NC Department of Administration, Division of Purchase & Contract in Raleigh, they will post the information on their website using an RFP form, RFQ form or IFB form. Bids will be returned to the College for review of specifications and our recommendation for award.

Any inquiries from other bidders or vendors should be directed to the College Purchasing Officer so that all information is recorded in the file.

## **SUMMARY OF BID PROCESS:**

1. **Determine whether or not you need 3 bids-**

If you are not a VP for any area please have **written** approval for this purchase from your VP before you begin.

2. **Write a detailed specification sheet.**

That will go along with the bid documentation (use expert's suggestions)

3. **Know your time frame.**

Allow at least 1 week for specifications to be written, vendors to be found and bid to be submitted.

Allow 1-2 weeks for the vendors to bid and then another week for the decision process to be completed.

4. **College Purchasing Officer will submit the bids to the vendors.**

5. **On Bid Opening day the bids will be reviewed**

By the College Purchasing Officer and the initiator and anyone else who it is determined needs to be a part of the decision process. An awarded vendor is decided and the **College Purchasing Officer will notify the awarded vendor.**

6. **A requisition will be submitted for the approvals process and a PO will be sent to the vendor.**

## **MISCELLANEOUS RULES**

### **SEEKING COMPETITION**

#### **Recall of Offers**

Offers may be recalled prior to opening upon signed request from an authorized agent of the offeror.

#### **E-Mail, Facsimile, and Telephone Offers**

E-mail, facsimile, and telephone offers shall not be accepted in response to solicitations that are required to be sealed. Sealed offers are required formal procurement solicitations.

#### **Public Openings**

Advertised procurements shall be publicly opened at the time, date, and place identified in the solicitation document. At the time of opening, the names of the companies, the manufacturer(s) and catalog number(s) of the item(s) offered, and the prices, deliveries, and payment terms submitted shall be tabulated, and this tabulation shall become public record, except as provided below.

Under a two-step process the cost proposal(s) shall not become public record until the technical offer(s) has been evaluated (first step) and then only those determined by the College which issued the solicitation document to have an acceptable technical offer shall have their cost proposal opened (second step). Cost proposals from those offerors whose technical proposals have been deemed acceptable shall be publicly opened, and the offeror(s) with the acceptable technical offer(s) notified of the time and place for the opening. At least two (2) College working days notice shall be given prior to the opening. In addition, there shall be at least two College employees present at the opening.

The cost proposals from offerors whose technical offers were deemed unacceptable shall remain unopened.

### **LATE OFFERS, MODIFICATIONS, OR WITHDRAWALS**

It is the sole responsibility of the offeror to have their offer delivered on time, regardless of the mode of delivery used, including the U.S. Postal Service or any other delivery services available.

No late offer or late modification shall be considered unless received prior to the bid opening, unless the offeror modification would have been timely except for the action or inaction of College personnel directly involved in the procurement process. Withdrawals will not be considered unless received prior to contract award. Purchasers shall review the reasons for any withdrawal request to ensure that allowing withdrawal would not compromise the procurement process.

### **MANDATORY CONFERENCES/SITE VISITS**

Mandatory site visits are a requirement that potential offerors must visit the premises where requirements will be used or installed to become familiar with site conditions. Site visits can be mandatory or non-mandatory. Mandatory site visits may restrict competition in that, unless an offeror attends the site visit, that offerors bid will not be accepted.

Pre-proposal or pre-bid conferences are held with potential offerors prior to solicitation of offers to clarify any ambiguities, answer offeror's question(s), and ensure that all offerors have a basic understanding of the solicitation requirements.

It is recommended the College urge and caution potential offerors to attend scheduled conferences or site visits rather than making them mandatory. When a solicitation requires potential offerors to attend a conference or site visit (mandatory or non-mandatory), the date, time, location, and other pertinent details of the conference or site visit shall be given in the solicitation document and in the advertisement (if required by rule).

If only one potential offeror attends the mandatory conference or mandatory site visit, the conference or site visit may continue to be conducted, but the solicitation shall be canceled immediately following the conference or site visit. If this occurs, the College shall investigate why only one potential offeror was in attendance and ascertain if there is any competition available. If it is determined that competition is available, the College shall again attempt to obtain competition, unless otherwise permitted by rule. If it is determined that there is no competition available, then the procurement may be handled as a waiver as permitted by rule.

Any and all questions by an offeror regarding a solicitation document shall be addressed to the purchaser named on the document. Any and all revisions to the solicitation document shall be made only by written addendum from the purchaser. Verbal communications are not binding.

# IT PURCHASING

NORTH CAROLINA  
OFFICE OF INFORMATION TECHNOLOGY SERVICES  
STATEWIDE INFORMATION TECHNOLOGY PROCUREMENT OFFICE  
[www.its.state.nc.us/itprocurement/](http://www.its.state.nc.us/itprocurement/)

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## 9 NCAC 6B .0301 PROCUREMENT PROCEDURES Summary for Information Technology Purchases

### Purchases Under \$25,000 Community College Delegation

- \$5,000 and under (small purchase) – procedures established by the College (usually three quotes)
- \$5,001 - \$10,000 competitive – solicit multiple written bids using RFQ or IFB form
- \$10,001 - \$25,000 competitive – solicit multiple written bids using IFB or RFP form; solicitation must be advertised for at least 10 days
- \$5,001 - \$25,000 *non-competitive* – issue written solicitation directly to vendor using RFQ form

## **BLANKET PURCHASE ORDERS**

Blanket orders are purchase orders that are issued for making small purchases over a limited period of time. Occasionally, the College Purchasing Officer may issue a blanket order instead of a purchase order for invoicing purposes. The procedure for blankets will be as follows:

1. All blanket purchase orders must have a start date and an expiration date. Usually the dates coincide with BCC's fiscal year and will cover the period 7/1/XX thru 6/30/XX. The requisitioner should determine the dollar amount needed for the year. It is the responsibility of each department to make sure the cumulative amount of the purchases not to exceed the total amount of the blanket order.
2. A description of the type of supplies to be purchased using the blanket order should be included on the requisition.
3. All blankets should list names of employees eligible to sign for purchases using the blanket.

# SPECIAL CIRCUMSTANCES

## EMERGENCY/PRESSING NEED PURCHASES

There are some instances that require making a FAST purchase – without waiting for a requisition to make its way through the purchase order process. The State defines these types of purchases to be Emergency Purchases or Pressing Need Purchases.

*Emergency:* a situation which endangers lives or property and which can be rectified only by immediate, on-the-spot purchase (or rental) of equipment, supplies, materials, printing, or contractual services.

*Pressing Need:* a need arising from unforeseen causes including, but not limited to, delay by contractors, delay in transportation, breakdown in machinery, delay or cancellation of a program or class, or unanticipated volume of work, and which can be rectified only by immediate on-the spot purchase (or rental) of equipment, supplies, materials, printing, or contractual services.

The State allows agencies to make FAST emergency/pressing need purchases if the following procedure is followed:

1. FAST purchases may only be authorized by the Vice President for Finance or the President. Call the College Purchasing Officer for a verbal, fast purchase order number BEFORE making the purchase.
2. FAST purchases should receive prior approval from the appropriate vice president by the requisitioner.
3. FAST purchases, after the purchase, still have to be channeled through the requisition process.
4. FAST purchases must be documented on the face of the requisition; by the requisitioner as to why this purchase was considered an emergency or pressing need purchase.
5. ALL RECEIPTS, invoices, and packing slips must be attached to the requisition.

**NOTE: *Anyone making a FAST purchase without prior approval from the Vice President for Finance or the President may be held PERSONALLY LIABLE for the cost of the purchase.***

The President and the Vice President for Finance can refuse to process any questionable FAST request. The College Purchasing Officer can refuse to process for payment any questionable follow-up requisition or payment request. The State Auditor can refuse the use of state, county, and special funds for FAST purchase after-the-fact, requiring the requisitioner to “pay back” the institution.

**Careful planning on the part of all employees may eliminate most emergency purchases.** Employees should request supplies at least ten (10) days prior to the time the materials are needed. On orders that are to be placed with out-of-town vendors, a period of four (4) weeks should be allowed. If items are to be bid, please allow at least, thirty (30) days for the requests for quotations to be sent out and received back for review.



# Bladen Community College

Post Office Box 266

Telephone 910-879-5503

Dublin, NC 28332

Fax 910-879-5523

## MEMORANDUM RATIFICATION OF "AFTER-THE-FACT" PURCHASE

### Documentation for Compliance Audit

Reference: Vendor: \_\_\_\_\_ Amount: \$ \_\_\_\_\_

Invoice No./Description: \_\_\_\_\_

Sound purchasing practices dictate that all requests for materials/services be approved by the Vice President, Vice President for Finance and in some circumstances the President. A requisition should be completed and a purchase order process **BEFORE** the purchase goods or services. Otherwise, the College is **not obligated to make payment**.

I am aware of Bladen Community College's purchasing policy and will take corrective action to prevent a reoccurrence.

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Vice-President for Finance

\_\_\_\_\_  
Date

CC: Dr. William Findt  
Vice-President: \_\_\_\_\_  
Accounts Payable file  
Jay Stanley

Rev. 05/11/2011

|   |                                     |
|---|-------------------------------------|
| <b>Timeline:</b> To be completed by the Business Office |                                     |
| Date of Requisition _____                               | Date Order Placed with Vendor _____ |
| Date Received in Financial Services _____               | Date of Invoice _____               |

## **SOLE (SINGLE) SOURCE VENDORS**

**Definition:** A sole source vendor is a company or person who sells a product or service that meets the unique needs of the purchaser; generally, **sole source** means the one and only source for the product or service in the United States (minimum). If a manufacturer has dealers or distributors anywhere in the country, it is not a true sole source; having regional, state, or area dealers or distributors does not constitute sole source.

**Examples:** The following are examples of sole source vendors:

- A new computer software company sells software that they developed and that can only be purchased from them.
- A piece of equipment the College has breaks down and the required parts and repair service can only be obtained from the one local company authorized by the manufacturer to sell and service in this state/country.

**Documentation:** Any knowledge of or justification for using a "sole source" vendor must be noted on the requisition for consideration by the College Purchasing Officer. If technical specifications are the justification, note them in detail for comparison to existing products and sources. Attach the following applicable documentation to the requisition:

- sole source letter from manufacturer (required)
- descriptive literature
- photographs
- diagrams
- technical data, etc.

**Approval:** If the purchase is properly justified, approved, and within the College's local limit of \$10,000, it can be processed without submitting to the N.C. Division of Purchase and Contract.

NOTE: If the purchase exceeds the local limit of \$10,001, it will be forwarded to the N.C. Division of Purchase and Contract with all accompanying data for evaluation. If the purchase is approved, the College will proceed with the order.

## **PROFESSIONAL SERVICE AGREEMENTS & CONTRACTED SERVICES**

All Professional Service Agreements (PSA's) and Contracted Service Agreements must be approved by the Vice President for Finance or the President. The original PSA should be attached to the requisition with all information, including budget code and approval signature(s), then forwarded to the College Purchasing Officer for processing.

NOTE: All contracted service suppliers are required to provide the College Purchasing Officer, Vice President for Finance, or the President with proof of insurance prior to beginning work; this documentation should be attached to the requisition before submitting to the College Purchasing Officer.

**Contracted Services:** Generally, terms of service contracts should not exceed a one-year term; however, an exception to this rule occurs where a vendor must make a significant investment in equipment to perform the service. In these cases, a longer contract term may be considered with the approval of the Vice President for Finance or the President.

Under G.S. 115D-58.5(a) community colleges are governed by State Purchase & Contract in the purchasing of supplies, equipment, and materials. There is no reference in the General Statutes as to how community colleges are to acquire services. Given this lack of statutory authority, BCC may elect, when in the best interest of the College, to acquire competition. Professional service agreements and specialized services are examples of services that may be utilized without seeking additional competition. BCC is responsible for awarding all service contracts.

### **CHECK TO ACCOMPANY ORDER**

Some suppliers require payment prior to the shipping of product. This is known as a “check to accompany order” request. Documentation requesting prepayment should be attached to the requisition (example: proforma invoice, subscription renewal, etc). **Print “CHECK TO ACCOMPANY ORDER” in capital letters on the face of the requisition.**

### **CHANGES TO PURCHASE ORDERS**

Changes to purchase orders already sent to a supplier must be requested by, or made with, consent of the College Purchasing Officer. Most suppliers are willing to make reasonable changes to orders without penalty to the purchaser.

A purchase order written to a supplier represents acceptance of an offer and is considered a binding contract. Breaking the contract in order to make changes to, or cancel, an order requires consent of both parties.

### **RETURNING PRODUCT TO SUPPLIERS**

The College Purchasing Officer must be notified prior to returning any product to a supplier. If the supplier permits a return, they may require the following before issuing an RMA:

1. Purchase order number
2. Item number on the purchase order
3. Description of item to be returned
4. Quantity to be returned
5. Reason for return
6. Replacement or refund requested

NOTE: If the item(s) being returned are categorized as major equipment, minor equipment, or tag – high theft, the end user must notify the Fixed Asset Coordinator first.

## **MAINTENANCE/SERVICE CONTRACTS**

All purchasing contracts must be reviewed by the College Purchasing Officer and approved by the Vice President for Finance or President. Only certain individuals in the Business Office are authorized to sign maintenance and service contracts on behalf of the College.

- Service or maintenance contracts are usually the most economical method of maintaining equipment.
- The original manufacturer or their service agency best maintains specialized critical equipment. It is advisable to consider having this type coverage.
- Parts and supplies are not always covered by maintenance contracts; however, the cost of labor, travel and service calls can usually justify this type of contract.

### **PROCEDURE**

A service/maintenance contract is initiated by submitting a requisition with an unsigned copy of the contract to the College Purchasing Officer. Any parts and supplies not covered by the maintenance contract require a separate confirming requisition at the time of the actual service request. Call the College Purchasing Officer to receive a FAST verbal purchase order number before returning any equipment covered by a maintenance contract for service. The PO number acts as a tracing, confirmation, verification number for your equipment. *Service is requested directly to the manufacturer or service agency by the department requiring service.*

Copiers throughout the College are covered by maintenance agreements, which are approved and administered by the Vice President for Finance or the President. If you have any questions pertaining to a copier maintenance agreement, please contact the IT Department.

Computers are not generally covered by maintenance contracts as BCC has its own in-house staff trained for computer repairs.

All construction-related contracts must be reviewed by the Vice President for Finance or President. The Director of IT Department will review all IT related contracts and submit to the College Purchasing Officer for final review before signing.

# PRINTING

Print jobs that can be completed by the BCC Print Shop are to be handled by that department and no competition is required. If using a source other than the BCC Print Shop competition is not required for purchases less than \$5,000, if greater than \$5,000, purchasers are encouraged to solicit competition due to the competitive nature of print jobs.

Printing specifications should include:

- **Item** (what it is...report, form, brochure, book, etc.)
- **Quantity** (how many do you want; will you accept overruns...if so, what percentage will be accepted and guaranteed for payment.) Industry is +/- 10%.
- **Size** (number of pages, finished page size, number of parts to the form, etc)
- **Construction** (how it is made...folds, binding, carbon, interleaf, etc.)
- **Copy** (what is in the item...text, photos, line drawing; how is it given to the printer...manuscript, camera-ready copy, boards, photos, negatives, slides, diskettes...size, language, format, etc.)
- **Printing** (what should the item look like...number of ink colors, halftones, separations, bleeds, screens, foil stamping, embossing, etc.)
- **Proofs** (what kind do you want to see, or do you? Page, blueline, composite progressive color, color key, etc.)
- **Stock** (what surface is the ink to be put on...kind/grade of text and cover, vinyl, cardboard, etc.)
- **Samples** (an ample number of the previous job should be sent to include with the solicitation.)
- **Packaging** (how should the item be packaged when you receive it; any unusual or special packaging instructions.)
- **Special Instructions** (be specific.)
- **Delivery** (when will the project be ready to be given to the printer, when would you like to have the item, when must you have the item, where should the item be delivered. Specify that vendor delivery is FOB Destination.)

## COST OF PUBLIC DOCUMENT

Every State agency publishing a public document, other than one published for the principal purpose of sale to the public, shall have the following statement to be printed adjacent to the identification of the agency responsible for the publication:

“(Quantity) copies of this public document were printed at a cost of \$\_\_\_\_\_, or \$\_\_\_\_\_ per copy.” *The term “cost” shall include printing costs in the form of labor and materials and any other identifiable design, typesetting and binding costs.* Any public document without a statement of cost shall not be mailed or distributed at public expense.

# SPECIFICATIONS

(<http://www.pandc.nc.gov/splist.asp>)

The primary purpose of a *purchase specification* is to provide a basis for obtaining a product or service that will satisfy a particular need at an economical cost. ***Specifications are defined as a detailed and exact written statement of particulars, prescribing materials, dimensions, or workmanship for something to be built, installed or manufactured.*** Specifications should be written to encourage, not discourage, competition consistent with seeking overall economy for the purpose intended.

There are two general types of specifications:

1. A standard specification is originated and developed by the Term Contracts Section of Purchase and Contract (P&C). It is comprehensive in nature and intended for repeated use.

When a specification is adopted as a standard, it becomes applicable to all purchases generally. Standard specifications are available from the Term Contract Section at the P&C website: <http://www.doa.state.nc.us/PandC/StateWideContracts.htm>.

2. The institution originates the other type of specification.

State P&C also has an approved qualified products list (QPL) that identifies products approved after an evaluation procedure. The list can be found at: <http://www.pandc.nc.gov/qplist.asp>. The essential characteristic of this procedure is the examination and pre-qualification of brands and models of products on the basis of samples and tests. Manufacturers are invited to submit products for evaluation and inclusion to the list. This list is intended to be used to compare quality and pricing for like or similar items needed for the College. Only manufacturers with products on the QPL list can be solicited for offers of those specific products. BCC cannot purchase items from QPL in an effort to avoid competition. These items are not considered to be on state contract and therefore are for reference only. Where articles are to be used for educational or training purposes, by handicapped persons, or for test and evaluation or research purposes, special or overriding consideration may be given to the waiver of competition and the award of contracts.

## DELIVERIES

When you place an order you are responsible for receiving the delivery of your items. If you need to add delivery instructions or a telephone number this must be added to your Purchase Order. If you are not the E-Procurement User who will be adding this order to the system, you will need to make sure they add this information to your order so that the vendor will have the delivery instructions.

If no instructions are added the vendor will deliver on his own time frame. **Most** deliveries will come to the mailroom/print shop in the Student Services Building, (Bldg 2). The Post Office, UPS, Federal Express, etc all know to take any packages or mail they have to the mailroom/print shop. Once the package arrives at the mailroom, the mailroom attendant will contact you to let you know your package has arrived and you will need to pick it up. If your package is too big for you to pick up then you can contact the maintenance department to have the item(s) brought to you.

When the delivery is large and shipped by a freight company they will not be able to deliver to the mailroom. Knowing how your shipment will arrive is very important and you should prepare for any large deliveries **before** the arrival date.

### **Items that will require special attention are:**

#### **Commodities Requiring Quality Acceptance Inspection:** <http://www.pandc.nc.gov/qcinsp1.htm>

This list identifies only those items that routinely require an acceptance inspection by the Quality Acceptance Representative PRIOR to release of final payment. The Quality Acceptance Inspection shall be mandatory when the item costs \$10,000 or more, except as noted. Purchasers shall include the statement calling for Quality Acceptance Inspection in the Invitation for Bids (or Request for Quotation), and furnish a copy of the IFB/RFQ to the Outreach and Education Section. Also furnish the Section with a copy of the Contract Certification/Purchase Order at the time of distribution.

#### **Furniture-**

Work with the company/sales rep to know when your delivery is arriving. If you have old furniture have it removed the day before your delivery by doing a WORK REQUEST to the Maintenance Supervisor. Your area must be clear in order to receive the new installation. The installers will not move your items. (If you have a large room full of furniture please contact the Fixed Asset Coordinator a week or so in advance so that they will be prepared to receive the furniture in a storage/surplus area). The furniture installers will bring in the new furniture, install it and take away any containers or cardboard. Be sure to check all working parts, (drawers, locks, etc) before they leave to insure things are in working order. You will probably be asked to sign saying you received the items in good working condition. Make note of any discrepancies or problems and discuss this with the installers. Contact the College Purchasing Officer and the sales rep as soon as possible, if you have any damages or problems. Bladen Community College will not pay for any damaged furniture until the problems have been resolved.

#### **Computers –**

The delivery of computers to your area may be handled by the IT Department. If you have requested and ordered computers please work with the IT Department to have a smooth transition with new computers. Computers will most likely arrive by freight. Know your delivery date and where they are to be stored until they will be set up. This must be a secure area. Be prepared by working with the IT Department in removing the previous computers from your area. As with other items that may be on the equipment inventory, any computer related equipment will need to be accounted for and the Fixed Asset Coordinator will need to be notified of the move.

## **ADVERTISING**

BCC must seek competition for contracted services such as food service, security guard services, vending services, landscape service, etc. Advertising is accomplished via posting to the State Purchase and Contract web site or via local advertisement methods. In addition, BCC may advertise non-required quotes through the IPS (Interactive Purchasing System) at the P&C web site (IPS web site: <http://www.doa.state.nc.us/PandC/NCIPSnOtherSolicitations.htm>) but must follow P&C rules. To view the State Purchase & Contract Purchase Manual go to: <http://www.doa.state.nc.us/PandC/PnCInformation.htm>. The College Purchasing Officer, Vice President for Finance and the President is responsible for all advertising of quote/bid documents placed on the IPS system for the College.

## **HUB UTILIZATION POLICY**

*See HUB Policy under separate heading. By reference here, the College Plan to Increase Participation by HUB in the Procurement of Goods and Services is incorporated into this manual.(See Page 46)*

## **PROTEST PROCEDURES**

A party wanting to protest a contract awarded to a solicitation must submit a written request to the College Purchasing Officer. This request must be received by BCC within thirty (30) consecutive calendar days from the date of the contract award, and must contain specific, sound reasons and any supporting documentation for the protest. Note: Contract award notices are sent only to those actually awarded contracts and not to every person or firm responding to a solicitation.

## **PURCHASER DISPUTES**

In order to avoid purchasers disputes after receipt of goods or services, the College Purchasing Officer will work closely with the purchaser to be sure that product descriptions, specifications, etc. will meet the needs of the purchaser. The College Purchasing Officer may, at its discretion, elect to have the purchaser review quotes or bids received to provide input prior to the actual award of the contract.

In the event that the purchaser does have a dispute, the purchaser will notify the supplier and the College Purchasing Officer of the problem. The purchaser will make every effort to resolve the issue directly with the supplier. In the event that no resolution is reached, the purchaser will request the College Purchasing Officer to become involved. This request must include the purchase order number, the supplier name, contact name, a description of the problem and an outline of what has taken place to date. The College Purchasing Officer will then take the lead in reaching a resolution that is in the best interest of BCC.

## **CONSTRUCTION VERSUS STANDARD PURCHASE DETERMINATION**

BCC shall review the items being included in a construction/renovation project and remove any items that they consider are non-related to the actual construction/renovation of the building.

Items that are considered commodities, or furnishings, to complete the project for use, shall be handled in accordance with the normal purchasing rules. Items that are usually removed from construction/renovation projects may include carpet, office panel systems, food service equipment, and furniture.

If the College determines that one of these items, or any item that is normally handled as a commodity purchase, is best suited for inclusion in the construction/renovation project, their justification shall be documented in writing for public record. In most instances, for buildings under construction, the carpet, office panels, etc. may not be pulled out of the construction contract. For renovation projects, in most cases, items such as carpet may be pulled out as a separate commodity.

## **NC ADMINISTRATIVE CODE**

## Administrative Code

## Reference

<http://www.doa.state.nc.us/PandC/admcode.htm>

01 NCAC 05A. 0102     **SCOPE**

**Printing, rentals, leases** and services **not** required to be processed through Division of Purchase Contract.

01 NCAC 05A. 0112     **DEFINITIONS**

Agency definition includes community colleges unless specifically exempted by reference.

01 NCAC 05B. 0301     **CONTRACTING  
REQUIREMENTS**

Except where a waiver, special delegation, exemption, or an emergency purchase is permitted by rule, all purchases involving the expenditure of public funds made by universities and other agencies for commodities, services and printing, **not** covered by statewide term contracts, shall comply with the following delegations and procedures:

(1) Small Purchases: A small purchase is defined as the purchase of commodities, services or printing, **not covered by a term contract**, involving an expenditure of public funds of five thousand dollars (**\$5,000**) or less. The executive officer of each agency, or his designee, shall set forth, in writing, purchasing procedures for making small purchases. The using agency shall award contracts for small purchases. The SPO may require a copy of the small purchase procedures be sent to the Division of Purchase and Contract.

(2) Purchases Governed by General Delegation or Statute:

(a) For purchases made by a university or **agency** involving an expenditure of public funds **over** five thousand dollars (**\$5,000**), **up to the benchmark** established for a university under the provisions of G.S. 116-31.10, and up to the general delegation limit for agencies established by the SPO under the provisions of G.S. 143-53(a)(2):

(i) **Competition shall be solicited;**

(ii) Solicitation documents requesting or inviting offers shall be issued;

(iii) Solicitation documents shall include standard language, including terms and conditions as published by the Division of Purchase and Contract on its home web page, unless prior written approval is obtained from the Division for unusual requirements. If additional terms and conditions are used, they shall not conflict with the Division's standard terms and conditions, unless prior written approval is obtained from the Division for unusual requirements; and

(iv) Mailing lists, if available from the Division of Purchase and Contract, may be requested and used in addition to mailing lists maintained by the university or agency for the purpose of soliciting competition.

(b) Agencies and universities shall advertise their solicitations through the Division of Purchase and Contract for the following purchases:

(i) Agencies: For purchases involving an expenditure of public funds exceeding ten thousand dollars (**\$10,000**), **up to the** general delegation limit for an agency established by the SPO under the provisions of G.S. 143-53(a)(2);

## Administrative Code

<http://www.doa.state.nc.us/PandC/admcode.htm>

## Reference

(ii) Universities: For purchases involving an expenditure of public funds exceeding twenty five thousand dollars (\$25,000), up to the benchmark established for a university under the provisions of G.S. 116-31.10.

Agencies and universities may advertise solicitations on smaller dollar purchases through the Division of Purchase and Contract.

(c) The using agency shall award contracts under the statutory limit for universities and the general delegation for all other agencies.

(3) Competitive Bidding Procedure: Where the total requirements for commodities, services or printing jobs involve an expenditure of public funds in excess of the expenditure benchmark established under the provisions of G.S. 116-31.10 or the general delegations established by the SPO under the provisions of G.S. 143-53(a)(2), the competitive bidding procedure as defined in G.S. 143-52 shall be utilized as follows:

(a) Sealed offers for commodities and printing shall be solicited by the Division of Purchase and Contract via advertisement;

(b) For service contracts, the universities and other agencies shall solicit sealed offers for their university/agency in accordance with the rules established for Sub-items (2)(a) and (b) of this Rule. After opening and completing the evaluation of offers received, the agency shall prepare a written recommendation for award, and if over the benchmark established under G.S. 116-31.10 or the general delegations established by the SPO, shall submit a copy of all offers received and their recommendation of award or other action to the Division of Purchase and Contract for approval or other action deemed necessary by the SPO (Examples: cancellation, negotiation, etc.). Notice of the Division of Purchase and Contract's decision shall be sent to the agency. The using agency shall award contracts for services;

(c) Sealed offers for statewide term contracts for commodities, printing and services shall be solicited by the Division of Purchase and Contract via advertisement.

(4) For each service contract handled by the agency, the agency shall prepare a task description of the services and desired results. Task descriptions shall contain all of the following:

(a) The date(s) of service (The contract shall not be for more than three years including extensions and renewals, without the prior approval of the SPO for unusual requirements);

## Administrative Code

<http://www.doa.state.nc.us/PandC/admcode.htm>

## Reference

- (b) Detailed specifications or type and level of work required;
  - (c) What the State shall furnish;
  - (d) What the contractor shall furnish;
  - (e) The method, schedule, and procedures for billing and payments; and
  - (f) Other subject matters bearing on the conduct of the work.
- (5) Rules applying to service and printing contracts do not apply to local school administrative units or community colleges.

*History Note: Authority G.S. 143-49; 143-52; 143-53; 143-53.1; Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. February 1, 1996; January 1, 1985; Temporary Amendment Eff. February 15, 1998; Amended Eff. April 1, 1999.*

01 NCAC 05B. 0901      **RESPONSIBILITY  
INSPECTION and TESTING**

In general, it is the responsibility of the receiving agency to inspect all materials, supplies, and equipment upon delivery to insure compliance with the contract requirements and specifications. However, when the contract requires an inspection by the Division of Purchase and Contract, it shall be conducted by a designee of the Division.

*History Note: Authority G.S. 143-60; Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. February 1, 1996.*

**Commodities requiring Quality Acceptance Inspection,**  
<http://www.doa.state.nc.us/PandC/qcinsp1.htm>

01 NCAC 05B. 0905      **SPECIFICAITIONS**

When it is determined to be advantageous, the agency which awarded the contract may authorize revisions to a contract specification, including any cost adjustment associated with any such revision, as part of contract administration. If an increase in cost results in the total contract value being more than the agency's benchmark or delegation, then prior written approval shall be obtained from the Division of Purchase and Contract, regardless of what agency initially awarded the contract.

*History Note: Authority G.S. 143-53; 143-60; Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. April 1, 1999; February 1, 1996.*

## Administrative Code

<http://www.doa.state.nc.us/PandC/admcode.htm>

## Reference

### 01 NCAC 05B. 1101(b) **USE TERM CONTRACT**

No agency may purchase any commodities, printing, or services covered by a statewide term contract from any other sources.

Rules applying to service and printing contracts do not apply to local School administrative units or community colleges.

*History Note: Authority G.S. 115C-522; 115D-58.5; 143-52; 143-53; 143-55; Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. April 1, 1999; February 1, 1996.*

### 01 NCAC 05B. 1105 **SPECIAL ITEMS**

In situations where a general type of item is covered by a term contract but a special type item is needed for a particular application, the agency may proceed with the purchase of the special type item under the rules of this Chapter. The need for the special type item in lieu of the general type item shall be justified by the agency/user in writing and the agency file documented for public record.

*History Note: Authority G.S. 143-52; 143-53; 143-55; Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. April 1, 1999.*

### 01 NCAC 05B. 1401 **POLICY WAIVER OF COMPETITION**

Under conditions listed in this Rule, and otherwise if deemed to be in the public interest by the SPO or the agency, if under its delegation or benchmark, competition may be waived. Conditions permitting waiver include cases where performance or price competition is not available; where a needed product or service is available from only one source of supply; where emergency action is indicated; where competition has been solicited but no satisfactory offers received; where standardization or compatibility is the overriding consideration; where a donation predicated the source of supply; where personal or particular professional services are required; where a particular medical product or service, or prosthetic appliance is needed; where a product or service is needed for the blind or severely disabled and there are overriding considerations for its use; where additional products or services are needed to complete an ongoing job or task; where products are bought for "over the counter" resale; where a particular product or service is desired for educational, training, experimental, developmental or research work; where equipment is already installed, connected and in service, and it is determined advantageous to purchase it; where items are subject to rapid price fluctuation or immediate acceptance; where there is evidence of resale price maintenance or other control of prices, lawful or unlawful, or collusion on the part of companies which thwarts normal competitive procedures; where the amount of the purchase is too small to justify soliciting competition or where a purchase is being made and a satisfactory price is available from a previous contract; where the requirement is for an authorized cooperative project with another governmental unit(s) or a charitable non-profit organization(s); and where a used item(s) is available on short notice and subject to prior sale.

*History Note: Authority G.S. 143-53; Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. April 1, 1999; February 1, 1996.*

## Administrative Code

<http://www.doa.state.nc.us/PandC/admcode.htm>

## Reference

|                   |                                     |   |
|-------------------|-------------------------------------|---|
| 01 NCAC 05B. 1402 | <b>APPROVAL and DOCUMENTATION</b>   | <p>Although competition may be waived pursuant to Rule .1401 of this Section, its use is required wherever practicable. Where waiver is contemplated, agencies may negotiate with a potential vendor(s) in an effort to acquire the quality of commodity, service or printing needed at the best possible price, delivery, terms and conditions, when the expenditure is less than their respective benchmark or delegation. A solicitation document requesting or inviting an offer(s) shall be issued by the agency, including standard language, terms and conditions issued by the Division of Purchase and Contract. Under an emergency or pressing need situation, a solicitation document requesting or inviting an offer(s) shall be issued by the agency, including standard language, terms and conditions issued by the Division, unless circumstances prohibit their use. Negotiations may also be conducted with a potential vendor(s) for contracts exceeding an agency's benchmark or delegation, but are subject to the conditions of Rule.1518 of this Subchapter, except where otherwise permitted by rule.</p> |
|                   |                                     | <p><i>History Note: Authority G.S. 143-53; Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. April 1, 1999; February 1, 1996; July 1, 1987.</i></p>   |
| 01 NCAC 05B. 1505 | <b>FUNDS FROM DIFFERENT SOURCES</b> | <p>(a) All public funds irrespective of source, whether special, federal, local, gifts, bequests, receipts, fees, or State appropriated, used for the purchase, rental, lease, installment purchase and lease/purchase of commodities, printing and services shall be handled under the provisions of Article 3 of G.S. 143 and in accordance with rules adopted pursuant thereto by the Division of Purchase and Contract.</p> <p>(b) Rules applying to service, rental, lease, and printing contracts do not apply to local school administrative units or community colleges.</p>  |
|                   |                                     | <p><i>History Note: Authority G.S. 143-53; 143-60(5); Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. April 1, 1999; February 1, 1996.</i></p>  |
| 01 NCAC 05B. 1523 | <b>PROCUREMENT CARD</b>             | <p>(a) Procurement cards (organizational charge cards) are for official use only and shall be used in accordance with this Section and with the statewide contract established and maintained by the Division of Purchase and Contract. Use of procurement cards by any agency is contingent on satisfactory compliance review, as determined by the Division of Purchase and Contract. As the State's electronic procurement system is implemented, it shall be used to the fullest extent possible, including issuance of purchase orders. Procurement cards may be used as a payment mechanism within e-procurement if permitted by fiscal policies of the agency.</p> <p>(b) Procurement card transactions processed through the State's electronic procurement system, utilizing the card as a payment mechanism within electronic workflow and approval</p>   |

## Administrative Code

<http://www.doa.state.nc.us/PandC/admcode.htm>

## Reference

processes, may be in any amount consistent with agency fiscal policies.

(c) For procurement card transactions processed outside the State's electronic procurement system, the per-transaction limit shall be two thousand five hundred dollars (\$2,500.00). This limit may be changed only under the following circumstances:

(1) In an emergency (as defined by .1602 or Governor's declaration), the agency card program administrator may request higher limits on cards in critical areas. Such increases shall be in effect no longer than the duration of the emergency. Requests for increased limits are to be made through the Division of Purchase and Contract if time permits and must be reported to Purchase and Contract in any case.

(2) Agencies may apply to the SPO for higher limits on specific types of transactions, with justification required.

(3) The SPO may adjust limits based on analysis of the procurement card program's results, on a statewide or agency basis, after taking into consideration current market trends, the economy, and recommendations received from the State Controller and the State Auditor.

(d) Each participating agency shall designate a procurement card program administrator, who shall be the chief purchasing officer or chief fiscal officer (or person specifically designated by either of these).

(1) All cards requested on behalf of the agency shall be sent to the program administrator (not to individual cardholders) by a traceable delivery method.

(2) Cards shall show the agency name, cardholder, the state seal or agency logo, and indicate they are for official use only.

(e) The card program administrator, in consultation with the agency's chief executive or fiscal officer, shall determine appropriate limits by per-transaction amount (not to exceed the statewide per-transaction limits set in Paragraphs (b) or (c) of this Rule) total per billing cycle, merchant categories, and similar factors. Agencies shall submit a copy of their procurement card policies and procedures to the Division of Purchase and Contract within 90 days after program implementation and thereafter whenever such policies or procedures are updated.

(f) The card program administrator shall determine compliance with agency policy and procedures, including cardholders' acknowledgement prior to issuance of cards, account reconciliation, and security.

(g) Agencies shall comply with procurement card policies prepared and disseminated by oversight fiscal offices (e.g., Office of the State Controller for state departments) governing those agencies under their responsibility.

## Administrative Code

<http://www.doa.state.nc.us/PandC/admcode.htm>

## Reference

(h) No other charge cards that obligate payment by the agency or the State shall be used unless an existing contract obligation requires its use, but that obligation shall be discontinued no later than June 30, 2003. Requests for exceptions to this rule shall be submitted in writing to the State Purchasing Officer. Consideration of requests will be based on need, compliance reviews and contract obligations.

*History Note: Authority G.S. 143-49(8);  
Temporary Adoption Eff. July 1, 2002; Eff.  
April 1, 2003.*

### 01 NCAC 05B. 1601      **EXEMPTIONS**

(a) Except as provided in Paragraph (c) of this Rule, it is not mandatory for the items and services listed in this Rule to be purchased through the Division of Purchase and Contract.

(1) purchase of liquor;

(2) perishable articles such as fresh meats;

(3) published books, manuscripts, subscriptions to printed material, packaged copyrighted software products, and like material;

(4) services provided by individuals by direct employment contracts with the State;

(5) public utility services (gas, water and electricity);

(6) telephone, telegraph and cable services furnished by those companies;

(7) services provided which are subject to published tariff rates as established by the North Carolina Utilities Commission;

(8) services which are merely incidental to the purchase of supplies, materials or equipment such as installation services;

(9) contracts for construction of and structural changes to public buildings;

(10) personal services provided by a professional individual (person) on a temporary or occasional basis, including (by way of illustration, not limitation) those provided by a doctor, dentist, attorney, architect, professional engineer, scientist or performer of the fine arts and similar professions; the exemption applies only if the individual is using his/her professional skills to perform a professional task; a personal service may also be a consulting service;

(11) services provided directly by an agency of the State, federal or local government, or their employees when performing the service as a part of their normal governmental function.

## Administrative Code

<http://www.doa.state.nc.us/PandC/admcode.htm>

## Reference

(b) In addition to products and services exempted by statute, the SPO may exempt other products and services from purchase through the Division provided that the SPO makes findings:

(1) that competition will not enhance the price that the State would receive for the product or service; and

(2) that competition will not enhance the quality of the product or service that the State would receive.

(c) Contracts for bakery products and dairy products shall be awarded through the Division of Purchase and Contract, if over the agency's expenditure benchmark.

*History Note: Authority G.S. 7A-6(B); 143-53; 143-56; 143-62; Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. April 1, 1999; February 1, 1996; May 1, 1988; July 1, 1987.*

01 NCAC 05B .1602

### **EMERGENCIES**

(a) An agency may make purchases of commodities, printing or services in the open market in cases of emergency or pressing need. For this purpose, a pressing need is one arising from unforeseen causes including, but not limited to, delay by contractors, delay in transportation, breakdown in machinery, printing or services.

(b) Agencies may negotiate with a potential vendor(s) in an effort to acquire the quality of commodity, service or printing needed at the best possible price, delivery, terms and conditions. A solicitation document requesting or inviting an offer(s) shall be issued, including standard language, terms and conditions issued by the Division of Purchase and Contract, unless circumstances prohibit their use.

(c) When emergency or pressing need action is necessary and the expenditure is over the agency's benchmark or delegation, prior verbal approval shall be obtained from the Division if time permits. Subsequently, whether or not such prior approval was possible, if the expenditure is over the agency's benchmark or delegation, an explanation of the emergency or pressing need purchase shall be reported in writing to the Division. The Division shall report such purchases of commodities and printing to the Board as a matter of record.

*History Note: Authority G.S. 143-53; 143-57; 143-60; Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. April 1, 1999; February 1, 1996.*

## Administrative Code

## Reference

<http://www.doa.state.nc.us/PandC/admcode.htm>

01 NCAC 05B .1603

### **SPECIAL DELEGATIONS**

(a) The SPO may authorize, by special delegation, any agency to purchase specific commodities, printing or services without limitation as to expenditure. Such delegation is normally confined, but not limited to, commodities, printing or services which by their nature or circumstance, such as perishableness, transportation costs, local conditions or local availability, would result in handling by the Division of Purchase and Contract serving no practical purpose. Every such delegation shall be in writing and made a matter of records.

(b) The SPO may require that offers received under such delegations be sent to the Division for determination of the successful vendor.

(c) The Division shall periodically review its special delegations of purchase to ascertain the availability of these commodities, printing or services and their continued suitability for delegation.

*History Note: Authority G.S. 143-53; Eff. February 1, 1976; Readopted Eff. February 27, 1979; Amended Eff. April 1, 1999; February 1, 1996; July 1, 1987.*

01 NCAC 05B. 1604

### **GENERAL DELEGATION**

Agency: \$10,000 - \$25,000

University: \$250,000 - \$500,000

The general purchasing delegation for agencies (except for the universities) shall be not more than ten thousand dollars (\$10,000). The SPO may lower or raise this general delegation for a specific agency, up to the amount established by G.S. 143-53.1, after consultation with the State Budget Officer and the State Auditor for State agencies, and upon consideration of the agency's (except for the universities) overall capabilities, including staff resources, organizational structure, training, purchasing compliance reviews, electronic communication capabilities, and audit reports. If an agency wishes to obtain an increase in its general delegation, it shall submit a request in writing, outlining its overall capabilities, to the SPO for the SPO's consideration.

*History Note: Authority G.S. 143-53; Temporary Adoption Eff. February 15, 1998; Eff. April 1, 1999.*

01 NCAC 05B. 1903

### **FILES**

(a) Each contract file shall be identified individually so it can be readily located and referenced.

(b) All purchase transactions shall be documented. As applicable, each file shall include:

(1) Original offers if in writing, or written documentation of verbal offers received;

(2) Reasons for award or cancellation;

(3) Worksheets/evaluations;

(4) Mailing list, if used;

## Administrative Code

<http://www.doa.state.nc.us/PandC/admcode.htm>

## Reference

(5) Written justification for waiver or emergency purchase:

(6) Tabulation of offers received;

(7) Copy of purchase order(s);

(8) Related correspondence;

(9) Reason(s) for receiving only one offer in response to a solicitation;

(10) Negotiated contracts; and

(11) Reasons for not accepting technical proposals.

(c) After award of contract all material in the file, except confidential information, shall be open to interested persons during normal office hours, may be hand copied, or copies shall be furnished in accordance with the Public Records Act.

*History Note: Authority G.S. 143-53; 143B-10(f); Eff. February 1, 1976;  
Readopted Eff. February 27, 1979;  
Amended Eff. April 1, 1999; February 1, 1996; July 1, 1987.*

01 NCAC 05D .0101

### **APPLICABILITY CONSULTANTS**

The Rules in this Section and Section .0200 are applicable to all agencies except local school administrative units and Community Colleges.

*History Note: Authority G.S. 143-64.24; 147-17; Eff. February 1, 1976;  
Readopted Eff. February 27, 1979;  
Amended Eff. February 1, 1996.*

## General Statute

<http://www.ncleg.net/>

**115D-58.5(b) Accounting System**

**115D-58.14 Purchasing Flexibility**

**115D-58.15(a) Lease Purchase and  
Installment Purchase  
Contracts for Equipment**

## Reference

(b) Each institution shall be governed in its purchasing of all supplies, equipment, and materials by contracts made by or with the approval of the Purchase and Contract Division of the Department of Administration except as provided in G.S.115D-58.14. No contract shall be made by any board of trustees for purchases unless provision has been made in the budget of the institution to provide payment thereof. In order to protect the State purchase contracts, it is the duty of the board of trustees and administrative officers of each institution to pay for such purchases promptly in accordance with the contract of purchase. Equipment shall be titled to the State Board of Community Colleges if derived from State or federal funds.

(a) Community colleges may purchase the same supplies, equipment, and materials from noncertified sources as are available under State term contracts, subject to the following conditions:

(1)The purchase price, including the cost of delivery, is less than the cost under the State term contract; and

(2)The cost of the purchase shall not exceed the bid value benchmark established under G.S. 143-53.1.

(b) The State Board of Community Colleges and the Department of Administration shall adopt policies and procedures for monitoring the implementation of this section. (1998-68, s. 2; 2005-103, s. 5.)

(a) Authority. – The board of trustees of a community college may use lease purchase or installment purchase contracts to purchase or finance the purchase of equipment as provided in this section

## APPENDIX

### REQUIRED REPORTING

- Historically Underutilized Business Report (Quarterly - Due Oct 30, Jan 30, Apr 30, Jul 30) (<http://www.doa.state.nc.us/hub/>)
- Purchasing Flexibility Report (Semi-Annually – Due Feb 1 and Aug 1)
- Recycle Report (Annually – Due Nov 15th (<http://www.p2pays.org/stag/>))
- EO50 Report (Monthly – Due by the 10<sup>th</sup> of each month)

### RESOURCES

- NC Community College System: <http://www.ncccs.cc.nc.us/webfs/index.html>
- NCCS Purchasing Manual: [www.ncccommunitycolleges.edu/Facility\\_Services/docs/Eq%20Proc%20Manual%20.pdf](http://www.ncccommunitycolleges.edu/Facility_Services/docs/Eq%20Proc%20Manual%20.pdf)
- NC Purchase & Contract: <http://www.doa.state.nc.us/PandC>
- NC P&C Purchasing Manual: <http://www.doa.state.nc.us/PandC/agpurman.htm>
- NC P&C State Contract Search: <http://www.doa.state.nc.us/PandC/StateWideContracts.htm>
- NC P&C locate HUB vendors: <http://www.pandc.nc.gov/VendorLinkNC.htm>
- NC P&C Specification Examples: <http://www.doa.state.nc.us/PandC/splist.htm>
- NC ITS Procurement: <http://www.its.state.nc.us/ITProcurement>
- NC E-Procurement: <http://eprocurement.nc.gov/>

### SPECIFICATION GUIDANCE (To be prepared by purchaser)

1. What are you buying? This should include a complete, accurate description of the item, item numbers, model numbers, quantity needed, and list of additional components needed to complete the system.
2. Is this a sole source? Why? If yes, obtain letter stating such from the manufacturer.
3. Do you need the item to be brand-specific? Why? What brand?
4. Is installation needed? If yes, must be included in specifications.
5. Is training needed? Major training or general instruction to user? Must be included on requisition.
6. Do you have any special delivery needs? Deadline for delivery? Inside delivery?
7. What kind of warranty is provided or required?
8. Do you need a maintenance contract for this kind of item?
9. Would used, refurbished or demo equipment be acceptable?

## **GUIDELINES**

**When initiating requests for commodities, the following guidelines established by the North Carolina Community College System and the North Carolina Department of Administration, Purchase & Contract Division must be followed:**

### **PURCHASE ORDER REQUIREMENT**

A purchase order is required before a purchase is made or receipt of any materials and/or services is accepted. An employee should not make a purchase expecting to be reimbursed without prior approval from the College Purchasing Officer. BCC is not responsible for payment of any purchases obtained without prior authorization. This includes purchases made for reimbursement and purchases invoiced through a vendor.

**EMPLOYEES PURCHASING ANY MATERIALS WITHOUT PRIOR WRITTEN OR VERBAL AUTHORIZATION FROM THE PURCHASING OFFICE MAY BE HELD RESPONSIBLE FOR PAYMENT OF SUCH PURCHASES.** If an emergency purchase order is needed, please call the College Purchasing Officer or come by the office with an approved request for supplies and we will expedite your order.

### **PURCHASING FROM OR THROUGH A COLLEGE EMPLOYEE**

Every reasonable effort shall be made to avoid making purchases from or through an employee of the College. Prior written approval from the State Purchasing Office (SPO) is required in instances that may develop where the College desires to make a purchase from college personnel. In deciding whether to grant such approval, the SPO shall consider the type item or service needed, the prevailing market conditions, whether competition is available, the cost involved, and the effects of doing business with the employee.

### **USE OF PURCHASING POWER FOR PRIVATE GAIN**

The purchasing power of the State or the College cannot be used for private advantage or gain. Purchases under contracts made by the College, shall not be allowed for personal use out of private funds, nor shall the College place orders for articles for ownership by employee or other individuals.

### **EQUIPMENT vs. SUPPLY ITEM**

Any one item costing \$1,000 (including shipping, installation, tax, etc) or more is considered equipment, unless the item is expendable, such as software. Any one item costing less than \$1,000 (including shipping, installation, tax, etc) is considered a supply item.

## **RECEIVING GOODS**

The instructor or staff member requesting supplies and equipment will receive a “vendor’s copy” of the requisition after the purchase order is processed and sent to the vendor. When an order is delivered directly to your office/department rather than to the receiving area or if an order is picked up by someone on your staff, the purchaser must notify the mailroom/print shop. In the case of equipment, if either of the scenarios above applies, then the purchaser will contact the Fix Assets Coordinator instead.

## **TECHNOLOGY RELATED ORDERS**

All technology related orders must be reviewed and approved by the Director of IT Services before being submitted to the College Purchasing Officer.

## **HISTORICALLY UNDERUTILIZED BUSINESSES (HUB)**

A Historically Underutilized Business is a business which is majority owned or managed by one or more minority persons, women, or disabled persons. BCC’s objective is to increase the College’s expenditures for the purchase of goods and services from HUB vendors to a goal of at least 10 percent while maintaining the integrity of sound financial practices and complying with state purchasing and contracting laws and policies. Please consider HUB vendors in all of your purchases. You may locate HUB vendors at the Purchase and Contract’s website:

<https://www.ips.state.nc.us/ips/Vendor/SearchVendor.aspx>

## **EQUIPMENT REPAIRS**

When equipment needs to be repaired, first make certain it is not covered under a service/maintenance agreement. If the equipment needing repair is IT-related, you will contact IT Department. For all other equipment, you will contact the Maintenance Department to find out if there is a service/maintenance agreement on the equipment.

**NOTE:** Contact the Fixed Assets Coordinator if ANY major equipment, minor equipment, or tag – high theft items (including IT-related equipment) must be sent or shipped off-campus for repairs **BEFORE** it is boxed and sealed.

If there is no maintenance agreement on the equipment needing repair and the repair work needs to be contracted out, simply prepare a requisition and forward it to Purchasing. You should take responsibility for determining if the item is worth repairing (as opposed to just replacing it). If the repair constitutes an emergency, please refer to the section titled “Emergency Purchases”.

## **END--OF--YEAR PLANNING**

In order to meet the needs of the entire College, all requests for the current fiscal year should be submitted, approved, and purchased no later than May 1<sup>st</sup> of the given year. This will allow for delivery and payment during the current fiscal year. Only emergency requests and purchases will be allowed after specified date.