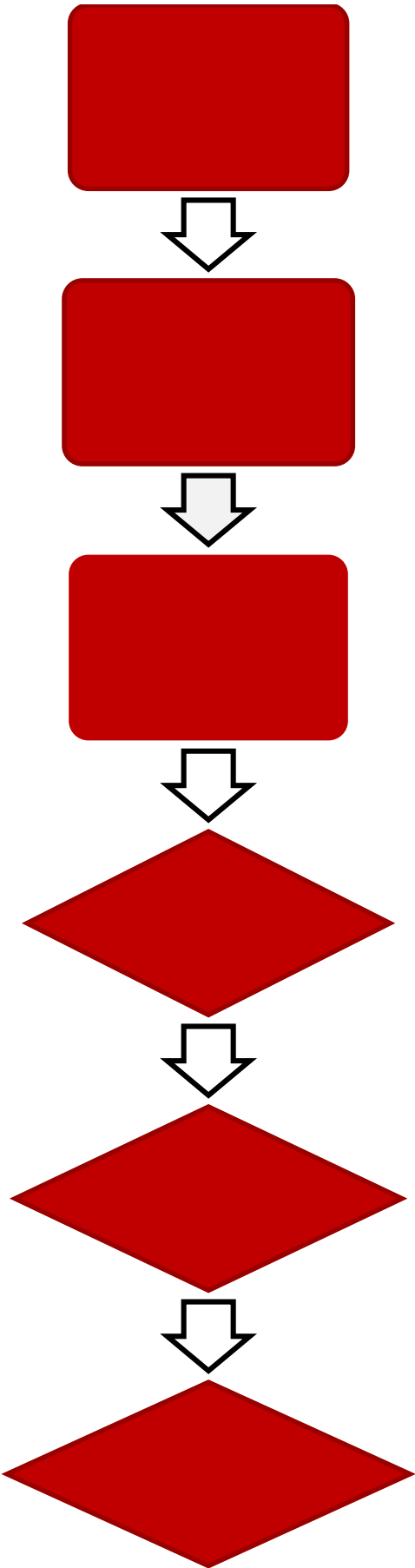




# **PURCHASING GUIDELINES**

**Last updated April 1, 2016**



**Contact vendors and  
provide three quotes\***





**SECTION 1- Purchasing General Terms and Concepts**

Purchasing Flexibility Option (see section P below). Items on a state contract may be ordered directly from the vendor subject to any restrictions on the specific term contract. Although the purchasing delegation limits do not apply to purchases made from state contracts, certain state contracts do have an abnormal purchasing dollar limit assigned to them.

If you need to review a State Contract, you may obtain a copy by going to the NC D 5x[(b)-19rac

procurement is the buying system that is used to initiate requisitions. Please keep in mind, just because a vendor is registered on E-procurement does not mean they are a vendor that has been designated to sell items for a particular commodity on a State Contract. Always, check the State Contract to verify designated vendors.

- (c) Where competition has been solicited but no satisfactory offers received
- (d) Where standardization or compatibility is the overriding consideration
- (e) Where a donation predicates the source of supply
- (f) Where personal or particular professional services are required
- (g) Where a particular medical product or service, or prosthetic appliance is needed

It is preferred that purchase orders only be issued to vendors who have registered with the E-Procurement system and that end users submit a requisition in E-procurement before making a purchase. For end users, E-procurement Web-Based Training and Job Aids can be found online. All E-procurement users are encouraged to utilize these E-procurement training aids. Please click the link below to access these training aids. The password to access the training modules is



**O.**



1. when the desired product must be compatible with or is an integral component of the existing equipment or products, or where prequalification of products is necessary to support specific needs of a program
2. when a product is covered by a patent or copyright; when the product must yield absolute continuity of results
3. or the product is one with which a user has had extensive training and experience, and the use of any other similar piece of equipment would require considerable re-orientation and training

-The end user must provide written justification in memo form to the purchasing office explaining the need for a brand specific request. This memo will be kept in the purchasing office for public record.

-If there should be a protest that would arise in regards to bid specifications that ask for brand specific products or merchandise, the end user will be responsible for addressing and defending the brand specific choice.

**\*\*\*\*\*Things to Consider When Creating Bid Specifications\*\*\*\*\***

What are you buying? This should include: An accurate description of the item, item numbers, model numbers, quantity needed, and list of additional components needed to complete the system.

Detailed product requirements (materials used, color, horsepower, minimum and maximum requirements)

Are there space or weight restrictions?

Provide any additional details of the functionality of each item/component that you deem necessary from an end user perspective.

Do you have drawings, diagrams, or other related representations that could provide further detail?

Specifications should not be photocopies/printouts from literature. They need to be typed.

Do you need a maintenance contract for this kind of item?

Would used, refurbished or demo equipment be acceptable?

Do you have any specific delivery requirements? Deadline for Delivery, etc.?









*A purchase request signed by the appropriate personnel with the budget code you wish to use and authorizing IT to make the purchase for you, should be sent to Information Technology.*

In an effort to expedite service and achieve the highest level of quality, your department should purchase technology related consumables directly from the state contract vendors. Information Technology will not order and supply departments with consumables.

## **X. EXEMPTIONS**

It is not mandatory for the items listed below to be purchased through P&C:

- a) Perishable articles such as fresh meats;
- b) Publish books, manuscripts, subscriptions to printed material, packaged copyrighted software products, and like material;
- c) Services (a service does not have any goods associated with it)
- d) Contracts for the construction of and structural changes to public buildings

## **SECTION 2- DETERMINATION OF ORDER REQUIREMENTS**

### **A. COMPLETE ORDER TOTALING \$5,000 OR LESS**

The first step is to determine that state contract merchandise or equipment is not available (To area of Section D above).

Competition is not required, but good purchasing practice suggests that it should be solicited wherever possible and documented. Wise spending and budget accountability is everyone's responsibility; therefore it is advised to always seek the best price available by obtaining competition.

### **B. COMPLETE ORDER OVER \$5,000 UP TO \$10,000**

1. The first step is to determine that state contract merchandise or equipment is not available. (To search for a state contract please refer to the link mentioned in the area of Section D above).
2. If there is no state contract for the desired merchandise or equipment, for any complete order over \$5,000 up to \$10,000 competition shall be solicited using Equote, a Request for Quotation, or any other solicitation document that contains the required standard language and the Terms and Conditions of the State of North Carolina from 3 sources is required.





**Typed specifications detailing all of the specifics of each piece of equipment/item that the end user is requesting. The specifications must be emailed in Word Format.** (Please see section Q for Requis

**Funding Approval Memo.** The following information needs to be noted in your funding approval memo:

- The estimated total expenditure
- The funding source
- Summary of what you are requesting
- Letter must be signed by the requestor

If **sole source** is being requested, a sole source request letter must be submitted to the Purchasing Office. (Please see section I above for what constitutes a sole source purchase).

After this information is received, The SCC Purchasing Office will initiate contact with the Purchasing and Contracts to begin the Purchasing Process.

#### **D. END USER BID EVALUATION**

When Bids/Quotes are received, the end user must evaluate the Bids/Quotes received from vendors to determine the most responsive and responsible bid. During the evaluation process, the end user must take an objective, unbiased approach to the bid evaluations. The end user must focus on the established specifications of the bid and whether the vendor offers are meeting the specifications that were required.

#### **E. VENDOR PROTESTS**

Upon completion of the bidding process and the subsequent award of contract to the appropriate bidder, all bidders that submitted proposals have the option to protest the award to insure fairness and to promote open competition. In the event of a bidder protest, it will be the responsibility of the individual that made the award recommendation to defend their recommendation.