

PROCUREMENT SERVICES POLICY 10 INTERACTION WITH VENDORS

The University of North Carolina at Greensboro

Approved by Paul Forte, Interim AVC for Finance, August 4, 2021

Revised August 4, 2021

1. Purpose

This policy describes the manner in which interactions with vendors for purposes of solicitations, demonstrations, and equipment evaluation should be handled.

2. Scope

This policy applies to all University employees, departments, units, and divisions.

3. Definitions and Roles and Responsibilities

3.1 Definitions

Solicitation: A request to vendors to make submissions to a purchasing organization.

Solicitation Document: A written Request for Quotes (RFQ), Request for Proposals (RFP), Invitation for Bids (IFB)

4. Policy

Solicitations and Demonstrations

Vendors may visit departments to keep them informed and abreast of new items being introduced. Vendors are advised to avoid making non-scheduled drop-in visits.

Vendor demonstrations to a department or to an individual in no way obligates UNCG to purchase or lease the equipment or service Any purchase requests issued after demonstrations will be handled in accordance with the normal purchasing regulations of the [University and the State Reference section 2.9, Vendor Presentations/Product Demonstration, of the State of NC Purchasing Manual](#).

Vendors are responsible for all expenses incurred during any demonstration. UNCG will not accept any responsibility for the safety of the vendor's equipment beyond normal care and safety.

Vendors must furnish the Procurement Services a certificate of liability insurance prior to hosting a demonstration on campus property.

Departments may request a vendor of a particular piece of equipment to conduct a demonstration. In these instances, the arrangements are worked out between the department and the vendor and require no further approval.

Receipt of equipment for demonstration purposes is permissible provided no obligation is made to the vendor to purchase the equipment.

Evaluations of Equipment

Vendors may request a department to evaluate equipment without obligation to purchase.

When the department is willing to have the equipment installed for evaluation purposes, the department should secure a written agreement using the following basic guidelines:

- Permission to demonstrate the equipment does not obligate the University to purchase the item.
- The evaluation of equipment for a vendor does not give the vendor permission to use the name of the University in any advertisement or as an endorsement.
- Equipment must be adequately identified and described with model and serial numbers.
- All shipping charges are to be paid by the vendor.
- Insurance, if any, is the responsibility of the vendor. The University assumes no liability for the equipment.
- The University may agree to exercise normal operational care and to avoid abuse of the equipment.
- At the end of the evaluation period, the vendor will be responsible for packing, removal and \or shipping the item.

Contact with Vendors during Solicitation and Proposal/Bid Review

Campus departments are reminded and cautioned that during the period of evaluation and prior to award, possession of the proposals/bids and accompanying information is limited to personnel of the State Division of Purchase and Contract, the University Procurement Services and to those who are specifically responsible for review and evaluation of the proposals/bids. There must be no vendor participation in the review and evaluation, and no information may be furnished to vendors regarding the status of the evaluations. All vendor contact, particularly for proposal/bid clarification, shall be made by the Procurement Services.

Correspondence with Vendors

Following the transmittal of a Purchase Order to a vendor, all correspondence in connection with the fulfillment of the order or contract should be handled by the Requisitioning Department. Campus departments should copy the Procurement staff on any matters they feel could result in a complaint to the vendor.

Complaints to Vendor

“[Complaint to Vendor forms](#)” are used by State agencies and institutions to inform vendors and the State Purchase and Contract Division of problems encountered with quality, service or delivery of commodities and services procured from that vendor.

When a vendor repeatedly provides poor service and/or merchandise does not meet written specifications to the extent that work is hampered, campus departments are to forward specific complaints to the Procurement Services. The complaint must be submitted in a written memorandum, email or letter and clearly explain the conditions which generated the complaint. The Procurement Services will complete the “Complaint to Vendor” form and transmit such to the State Purchase and Contract Division or take appropriate action directly with the vendor. Campus departments are urged to make written complaints, when justified.

If a vendor receives an excessive number of complaints, the State Purchase and Contract Division in Raleigh may refrain from considering the vendor as a ‘source of supply’ for any new requirements or when compiling source lists.

Sales Calls by Vendors

As State policy requires that supplies and materials normally be obtained from Statewide Term Contracts or by competition, sales calls or solicitations by vendors’ salespeople may be of little value.

Salespeople are encouraged to visit campus departments; however, such visits are to be limited to keeping the campus departments informed of new items being introduced and to assist campus departments by providing information on various aspects of their product.

Receipt of equipment for demonstration and evaluation purposes is permissible provided no obligation is made to the vendor to purchase the equipment.

5. Compliance and Enforcement

The Director of Procurement Services is responsible for ensuring compliance with this policy.

Any violations will be reviewed by the Procurement office and in accordance with UNCG Human Resources policies as well as the Office of State Human Resources policies.

6. Additional Information

6.1 Supporting Documents

[NC DOA Purchase and Contract](#)

[Complaint to Vendor Form](#)

[Procurement Procedure B Solicitation of Bids and Quotations](#)

6.2 Approval Authority

This policy will be approved by the Interim Associate Vice Chancellor for Finance.

6.3 Contacts for Additional Information and Reporting

- Responsible Executive: Michael Logan, Director of Procurement Services, (336)334-4104, **mflogan@uncg.edu**
- Responsible Administrator: Richard Fleming, Assistant Director of Procurement Services, 336-334-3078, **rrflein@uncg.edu**