



Document Name	Procurement Procedure B Solicitation of Bids and Quotations
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Related Policies and Procedures	Policy 3 Statewide Term Contracts Procurement Services Policy 6 Sole Source Purchase

1. Purpose/Introduction

This document provides instructions on the solicitation of bids and quotations.

2. Definitions

Agency - All departments, institutions, boards, commissions, universities, or other units of the State (including the Division of Purchase & Contract), and community colleges and local school administrative units, unless specifically exempted herein by reference.

Requests for Proposals (RFP): A formal solicitation document typically used for seeking competition and obtaining offers for more complex services or a combination of goods and services used for competitive procurements over \$75,000.

Invitations for Bid (IFB): A formal solicitation document, used to seek competition for easily defined goods and simple services. This document or the RFP is required to be used for competitive procurements over \$75,000.

Requests for Quotation (RFQ): A solicitation document normally used for non-advertised competitive procurements within the range of \$25,000 to \$75,000.

Requests for Information (RFI): The RFI is an informal document used to request information from vendors about products or services when an agency does not have enough information readily available to write an adequate solicitation document. The

RFI should provide as much information as possible to define the type of information that is being sought. While information gathered from vendors' responses to the RFI may be used to enhance the agency's future procurement, the RFI should state that it is not a request for offer and that no award will result. Since the RFI is not a solicitation for procurement, the State's terms and conditions should not be included in the document.

Interactive Purchasing System (IPS) – State of NC site where all formal solicitations over \$25,000 must be posted.

STATEWIDE TERM CONTRACT: A contract handled by Purchase and Contract, or Statewide IT Procurement Office for all agencies, unless exempted by statute, rule, or special term and condition specific to that contract.

TERM CONTRACT: A binding agreement between purchasers and sellers to buy and sell certain commodities, printing, or services at certain prices and under stipulated terms and conditions. A contract generally intended to cover all normal requirements for a commodity or contractual service for a specified period based on estimated quantities only. Sometimes referred to as a "requirements contract" or an "indefinite quantity contract".

TERM CONTRACT – AGENCY SPECIFIC: Agencies may handle agency specific term contracts for use by their agency if the expenditure over the term of the contract is under their benchmark or delegation, and the commodity, printing, or service is not covered by a statewide term contract.

Small Purchase – The purchase of a good or service for \$5,000 or less.

General Delegation – The authority granted by the State Purchasing Officer (SPO) for an agency to handle purchases made under a certain dollar amount, in accordance with the guidelines in the State Procurement Manual

Special Delegation – The authority granted by the State Purchasing Officer (SPO) for an agency to handle a specific or special purchase, where it would serve no practical purpose for the purchase to be handled by the State Purchasing & Contracts (P&C) Office.

Correction Enterprises – operation within the NC Department of Public Safety. Correction Enterprises mission is to provide the state's inmates with opportunities to learn job skills by producing goods and services for the Department of Public Safety and other tax-supported entities.

3. Procedural Steps

Prior to acquiring any goods or services please check the following sites:

- [SpartanMart](#)
- [State of NC Statewide Term Contracts](#)
- [UNC System agreements](#)
- [UNCG Procurement Services website](#)
- [State of North Carolina Correction Enterprises](#)

Contact Procurement Services for guidance or assistance. Procurement Services has access to different contracts and can assist in identifying potential sources.

Solicitations \$25,000 and under (small purchase, no competition required)

- Request for Quote (RFQ) can be issued if needed.
- Written informal quotes can be obtained (may use fax or email quotes).
- If a service, verify vendors insurance if work is on state owned/leased property or facilities.
- If applicable, verify appropriate certifications/licenses are in place.
- Utilize [UNCG contract template](#) if needed.
- Goods and services can be ordered via Spartan Mart Purchase Order, SpartanMart Payment Request, or PCard. Reference the [Procurement Services site](#) for additional guidance and policies (Procure2Pay Guidance for Commodities and Services)

Solicitations over \$25,000 and up to \$75,000 (competition required)

See Procurement Services Policy 3 and Policy 6 for allowable exceptions. Should the situation not meet these criteria, the following procedures must be used.

Note: The two exceptions to this are when an agency buys from either Correction Enterprises or from a Nonprofit Work Center for the Blind and the Severely Disabled (See Section 1.3.17 Preferences). For purchases made by an agency involving an expenditure over \$5,000, up to its general delegation limit.

- Requesting department will create a requisition in [Spartan Mart](#)
- Procurement Services will review the requisition and create appropriate solicitation document
- Solicitation document requesting or inviting offers shall be issued by Procurement Services
- Three (3) quotes must be obtained
- Requesting department can identify three (3) potential sources
- If applicable, Procurement Services can post the solicitation in the State of NC Interactive Purchasing System (IPS)
- Procurement Services will review responses with the requesting department and advise of Award
- Procurement Services will process the requisition and a Purchase Order will be forwarded to the awarded vendor.

Solicitations over \$25,000 and up to \$500,000 (competition required)

See Procurement Services Policy 3 and Policy 6 for allowable exceptions. Should the situation not meet these criteria, the following procedures must be used.

Note: The two exceptions to this are when an agency buys from either Correction Enterprises or from a Nonprofit Work Center for the Blind and the Severely Disabled (See Section 1.3.17 Preferences).

- Requesting department will create a requisition in [Spartan Mart](#)
- Procurement Services will review the requisition and create appropriate solicitation document
- Solicitation documents requesting or inviting offers shall be issued by Procurement Services
- Solicitation documents are required to be posted, by Procurement Services, on the State of NC Interactive Purchasing System (IPS)

- Bid must remain open on the IPS site for a minimum of 10 days
- All bid responses will be opened on the bid due date and time
- Procurement Services will review responses with the requesting department and advise of Award
- Procurement Services will post both the Bid Results and Award on the IPS site - Procurement Services will process the requisition and a Purchase Order will be forwarded to the awarded vendor.

Solicitations over \$500,000

[UNCG's current delegation/benchmark](#) is \$500,000. Any purchase request for over \$500,000 must be submitted to Procurement Services. Procurement Services will review and seek guidance or approval from the State Purchasing & Contracts Office.

- All proposed solicitations with an estimated value exceeding \$1,000,000 must be reviewed by the NC Attorney General or the designee prior to posting.

NOTE

Formal bids solicited by the State Purchase and Contract Division for requirements exceeding \$500,000 may require up to forty-five to sixty days.

NOTE

It is not permissible to divide requisitions to keep amounts under \$5,000.00 to avoid the formal bidding process.

The State of NC Procurement Manual describes the laws, rules (Administrative Codes), policies and procedures that must be followed in carrying out the responsibilities of a purchaser for UNCG. Throughout this manual the text describing the requirements and procedures to be followed are linked to the formal statement of those requirements and procedures in the North Carolina General Statutes and North Carolina Administrative Codes. These resources are also included at the end of the [NC Procurement Manual](#) for easy reference.

4. Forms, Tools, Etc.

- [UNCG Spartan Mart](#)
- [State of NC Purchasing and Contracts \(P&C\)](#)
- [State of NC Interactive Purchasing System \(IPS\)](#)
- [Procurement Services Policy 3 Statewide Term Contracts](#)
- [Procurement Services Policy 6 Sole Source Purchase](#)

5. Revision Table

Revision #	Section #	Summary of Changes	Approval Date