



# P&C Quarterly Updates Webinar

## June 2022

Presenters:

David O'Neal, State Purchasing Officer

Nicole Hunter, Deputy State Purchasing Officer, Strategic Sourcing



# Welcome and Introductions



Session will be recorded

# Question and Answer Session

- Add your questions to the chat
- Questions will be addressed at the end of each topic



# P&C Initiatives – June 2022


P-Card Increase

Non-Profit Work Centers for the Blind

Agency Procurement Plan (APP)

P&C Strategic Sourcing Team

# P-Card Increase

	
<b>Purchase &amp; Contract Division</b> David O'Neal   State Purchasing Officer	Roy Cooper   Governor Pamela B. Cashwell   Secretary

June 17, 2022

**MEMORANDUM**

TO: Agency Purchasing Directors & Agency P-Card Administrators

FROM: David O'Neal, State Purchasing Officer  
North Carolina Department of Administration, Division of Purchase & Contract

RE: P-Card Single Transaction Limit Increase and Compliance Requirements – STC 946A

The Division of Purchase & Contract, upon consultation with the Office of the State Controller and the Office of the State Auditor has approved an increase to the Single Transaction Limits (STL) of State issued P-cards for general purchases, to \$25,000.00, effective June 20, 2022. This increases the Single Transaction Limit from the previous level of \$5,000.00 up to \$25,000.00. The limit for all travel related purchases, including airfare, hotel/lodging and transportation/rental cars will remain at \$25,000.00. This increase mirrors the Small Purchase Benchmark increase that was approved with the adoption of 01 NCAC 05B .0301 in March of 2022.

These amounts (\$25,000.00 STL for both general purchases and travel) also apply to split transactions exceeding these amounts without receiving prior SPO approval. For instance, a single Cardholder purchasing multiple airline tickets, on the same day or within a few days, with a total exceeding \$25,000.00, shall be required to submit approval request to the SPO prior to ticket purchase.


This approval is for an increase in the STL amount only and not approval of the procurement. The Agency must have proper documentation, in accordance with its procurement policies and procedures to support each purchase. Each Agency has the authority to determine if travel related purchases are allowable and it must be documented in its P-Card Manual.

If an agency wishes to apply this increase to the STL for agency P-Card users, the agency must update their P-Card Policy Manual to reflect this change and submit the edited documents to the Division of Purchase & Contract.

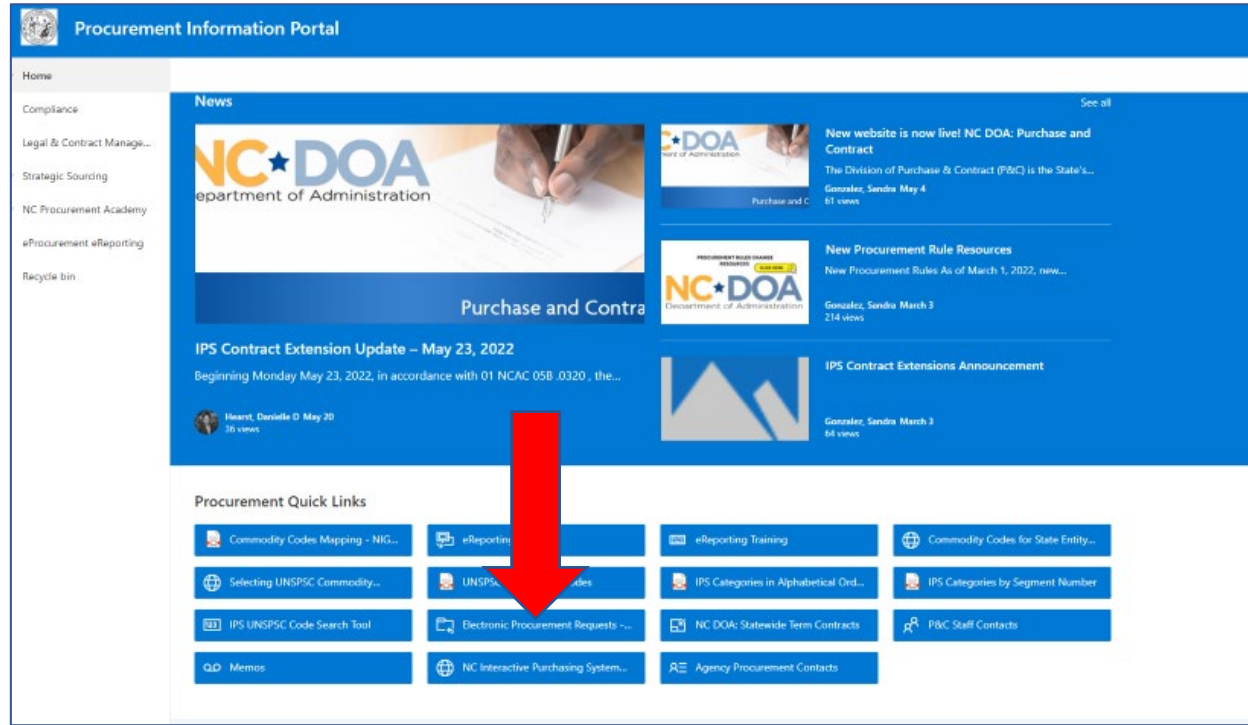
At this time, the Division of Purchase & Contract, will review all requests for a Single Transaction Limit Increase exceeding \$25,000.00. The Card Administrator must submit these requests via an e-form, which will include the Cardholder Name, Vendor Name, Product/Service Description, Amount and Date(s) needed. Requests are typically addressed/approved within a 24-hour period. The link to the e-form is below:

[P-Card Single Transaction Limit Increase Request](#)

Should you have any additional questions, please feel free to contact the Division of Purchase & Contract.

Mailing 1305 Mail Service Center   Raleigh, NC 27699-1305	 ncadmin.nc.gov	Location 116 West Jones St.   Raleigh, NC 27603 984-236-0241 T
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# P-Card Increase



**Procurement Information Portal**

Home

Compliance

Legal & Contract Manage...

Strategic Sourcing

NC Procurement Academy

eProcurement eReporting

Recycle bin

**News**

**NC+DOA**  
Department of Administration

**Purchase and Contra**

**IPS Contract Extension Update – May 23, 2022**  
Beginning Monday May 23, 2022, in accordance with 01 NCAC 05B .0320 , the...

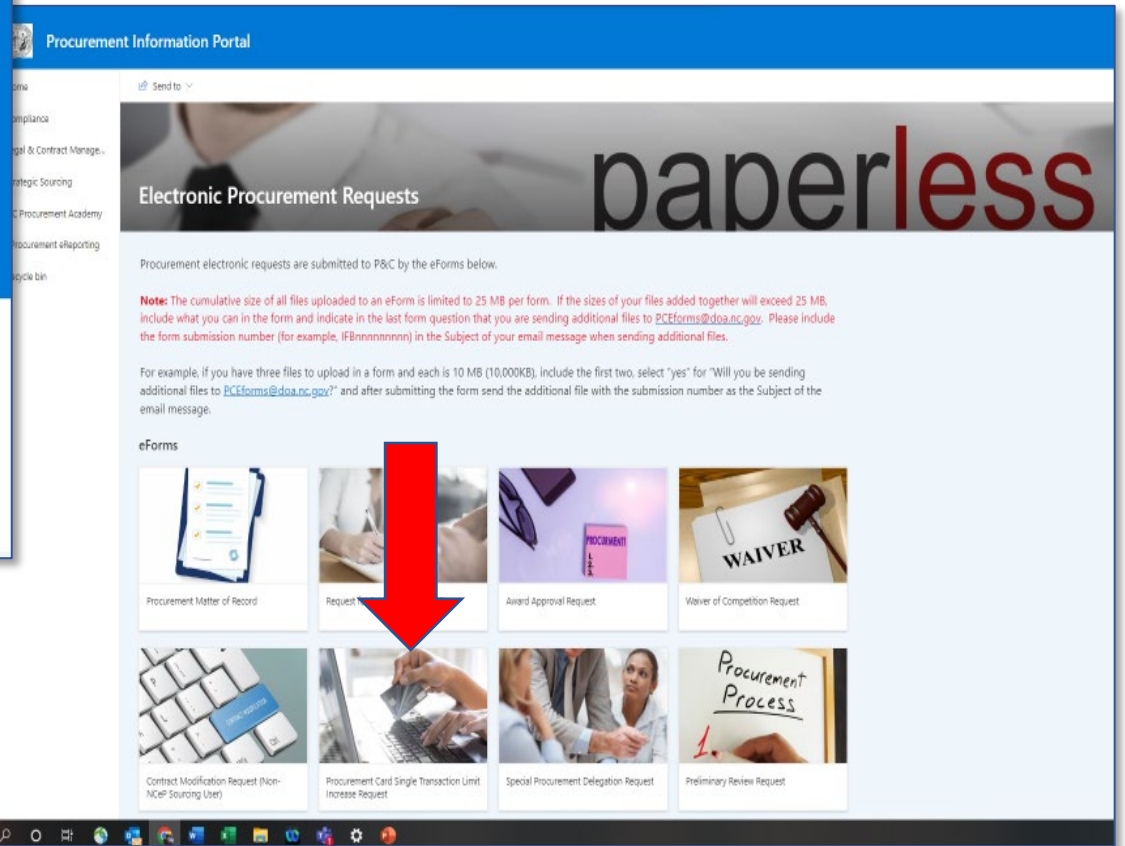
**New website is now live! NC DOA: Purchase and Contract**  
The Division of Purchase & Contract (P&C) is the State's...  
Gonzalez, Sandra May 4  
61 views

**New Procurement Rule Resources**  
New Procurement Rules As of March 1, 2022, new...  
Gonzalez, Sandra March 3  
214 views

**IPS Contract Extensions Announcement**  
Gonzalez, Sandra March 3  
68 views

**Procurement Quick Links**

- Commodity Codes Mapping - NIG...
- eReporting
- eReporting Training
- Commodity Codes for State Entity...
- Selecting UNSPSC Commodity...
- UNSPSC Codes
- IPS Categories in Alphabetical Ord...
- IPS Categories by Segment Number
- IPS UNSPSC Code Search Tool
- Electronic Procurement Requests ~...
- NC DOA: Statewide Term Contracts
- P&C Staff Contacts
- Q&A Memos
- NC Interactive Purchasing System...
- Agency Procurement Contacts



**Procurement Information Portal**

Send to

**Electronic Procurement Requests**

paperless

Procurement electronic requests are submitted to P&C by the eForms below.

**Note:** The cumulative size of all files uploaded to an eForm is limited to 25 MB per form. If the sizes of your files added together will exceed 25 MB, include what you can in the form and indicate in the last form question that you are sending additional files to [PCForms@doa.nc.gov](mailto:PCForms@doa.nc.gov). Please include the form submission number (for example, IF8nnnnnnn) in the Subject of your email message when sending additional files.


For example, if you have three files to upload in a form and each is 10 MB (10,000KB), include the first two, select "yes" for "Will you be sending additional files to [PCForms@doa.nc.gov](mailto:PCForms@doa.nc.gov)?" and after submitting the form send the additional file with the submission number as the Subject of the email message.

**eForms**

- Procurement Matter of Record
- Request
- Award Approval Request
- Waiver of Competition Request
- Contract Modification Request (Non-NICE Sourcing User)
- Procurement Card Single Transaction Limit Increase Request
- Special Procurement Delegation Request
- Preliminary Review Request



# P-Card Increase

**Purchase & Contract**  
Department of Administration

**PROCUREMENT CARD SINGLE TRANSACTION INCREASE REQUEST**

**Instructions:** This request should be submitted by the Procurement Card Administrator of the requesting agency when requesting a procurement card purchase limit increase. A copy of your submitted request will be sent to your email address, and the State Procurement Card Administrator will review the request and respond within 1-3 business days.

**Policy**

**Transaction limits for state agencies and state departments.** Each transaction on the procurement card is not to exceed \$25,000 for general purchases and \$25,000 for Travel purchases. Agencies may set lower limits either for all purchases or specific cases, as they think best. Purchases can be limited by amount per transaction, total per period, number of purchases per period, Merchant Category Codes (MCC), and in many other ways. Each card can have specific controls unique to that cardholder's responsibilities. Exceptions to this limit are described in [01 NCAC 05B .1523](#).

**Transaction limits for other eligible entities.** Other eligible entities may set limits either for all purchases or specific cases, as they think best. Purchases can be limited by amount per transaction, total per period, number of purchases per period, Merchant Category Codes (MCC), and in many other ways. Each card can have specific controls unique to that cardholder's responsibilities. Other eligible entities should develop a procurement card manual specific to their organization and monitor card usage on a regular basis to insure cards are being used appropriately.

**PROCUREMENT CARD ADMINISTRATOR**

Name\*

First NameLast Name

Email\*

Phone\*

Select the entity type\*

Select from list

# Question and Answer Session

- P-Card Questions?

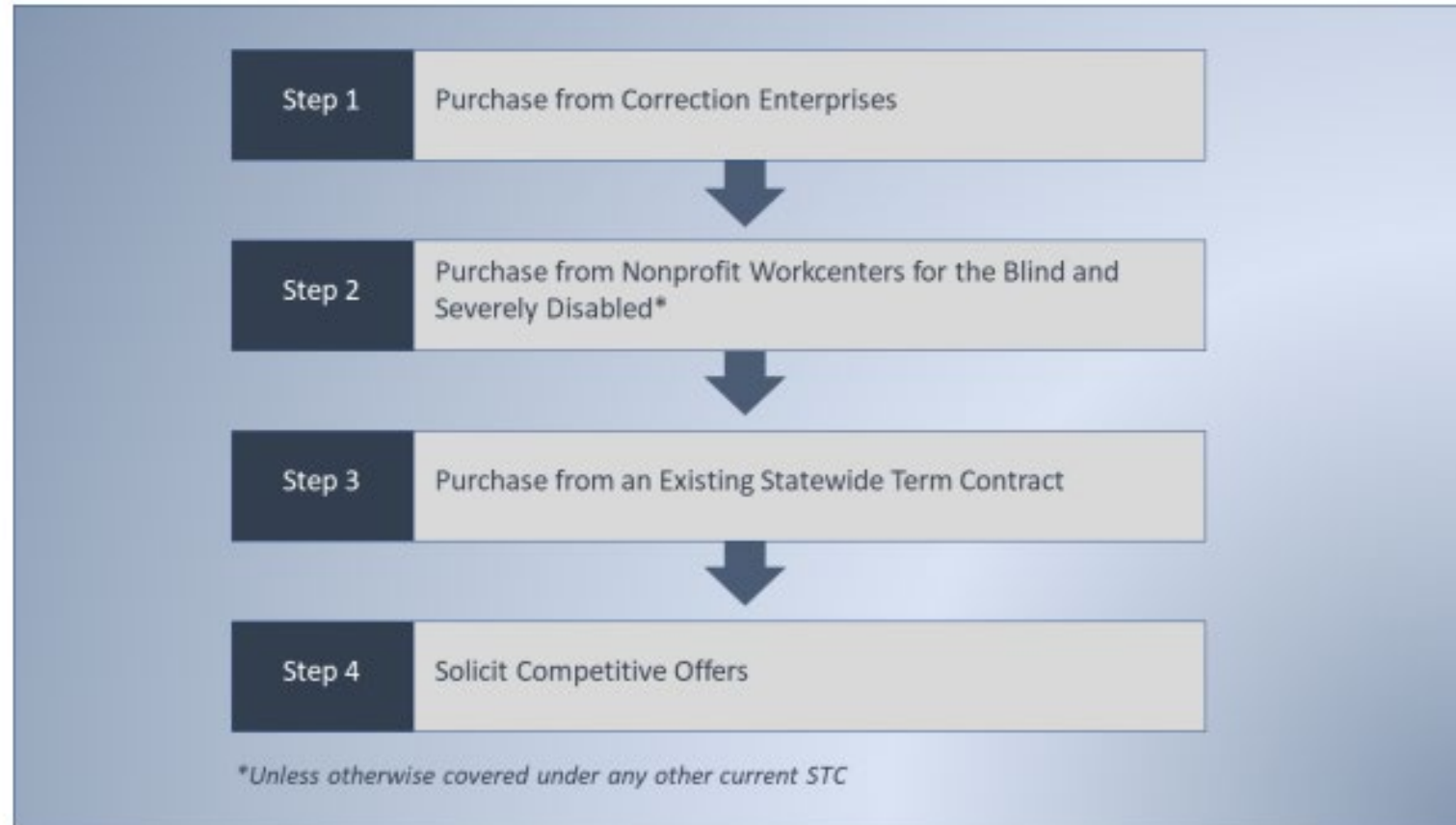




# Non-Profit Work Centers for the Blind

- Session law 2021-180, Section 20.12 (a) through (c) amended G.S. 143-129.5 to require that P&C annually canvass nonprofit work centers for the blind and severely disabled to determine what goods and services they offer and to secure contracts to make those goods and services available to the state entities that require them.
- G.S. 143-48.2 was also amended to require that state entities purchase from those contracts so long as: 1) The purchase of goods does not exceed the agency's general delegation. 2) The goods or services are not available from an STC. 3) The goods are not available from Correction Enterprises. 4) The goods or services must be of suitable price and quality, as determined by the agency.
- Where needed goods or services are not available from Correction Enterprises, state entities must determine whether those items can be supplied pursuant to the STC established with the nonprofit work centers for the blind and severely disabled.

# Non-Profit Work Centers for the Blind



# Non-Profit Work Centers for the Blind



## Statewide Term Contract 0002A -Goods and Services from NPWCBSD

<b>Bid Number</b>	DPC-355257846-NE
<b>Contract Name</b>	Goods and Services from NPWCBSD
<b>Effective Dates</b>	May 23, 2022 - Indefinite contract term GS 143.129.5 (b)
<b>Awarded Vendors and Contacts</b>	<b>Eastern Carolina Vocational Center Inc.</b> - <a href="#">Jason Thomas</a> 252-317-3103 <b>Industries of the Blind Inc.</b> - <a href="#">Richard Oliver</a> 336-544-3729 <b>LC Industries</b> - <a href="#">Anne Strickland</a> 910-591-6027 <b>Lions Services Inc.</b> - <a href="#">Kathy Mullins</a> 704-921-1527 <b>Winston-Salem Industries for the Blind (IFB Solutions)</b> - <a href="#">Dan Carson</a> 703-623-0056  <b>Open Enrollment Period</b> The state will have an annual open enrollment period that will be advertised on IPS and conducted prior to the anniversary of the initial contract awards and continuing every year for the duration of the contract.
<b>Contract Usage</b>	<b>§ G.S. 143-129.5. Purchases from nonprofit work centers for the blind and severely disabled.</b>  (a) Notwithstanding G.S. 143-129, a city, county, or other governmental entity subject to this Article may purchase goods and services directly from a nonprofit work center for the blind and severely disabled, as defined in G.S. 143-48.  (b) The Secretary of Administration shall, at least annually, canvass nonprofit work centers for the blind and severely disabled for goods and services required by the state government or any of its departments, institutions, or agencies and shall purchase or contract for the purchase, lease, or lease-purchase of those goods and services. The Secretary shall establish and enforce specifications that shall apply to all goods and services to be purchased or leased from nonprofit work centers for the use of the state government or any of its departments, institutions, or agencies. Except as provided in G.S. 148-134, where one or more sources of supply have been established by contract and certified by the Secretary of Administration to state departments, institutions, and agencies, it shall be the duty of all state departments, institutions, and agencies to make requisition or issue orders on forms to be prescribed by the Secretary of Administration for purchases required by them upon the sources of supply so certified. No state department, institution, or agency shall purchase from any sources other than those certified by the Secretary unless the requisition cannot be fulfilled because of insufficient availability of goods or services required. The Secretary shall, in any contract or lease, require that nonprofit work centers maintain the price of goods or services substantially in accord with that paid by governmental agencies for similar goods or services of equivalent quality. The provisions of G.S. 143-52 shall not apply to purchases made pursuant to this section. However, nothing in this section shall prohibit a nonprofit work center from submitting bids or making offers for contracts under G.S. 143-52.

### Contract Covers

This contract covers goods and services that are available through the Non-Profit Work Centers for the Blind and Severely Disabled (NPWCBSD), in accordance with § G.S. 143-129.5. This contract covers comprehensive product lines from multiple vendors including the following highlighted item types:

#### Goods

- Batteries
- Lights
- Janitorial supplies
- Office supplies and consumables
- Warehousing storage
- Police- and military-style gear
- Prescription dress and safety eyewear
- Mattresses

#### Services

3PL Services (Industries of the Blind) and Call Center Services (Winston-Salem Industries for the Blind) are available through the contract. Requirements shall be negotiated between the using agency and vendor on a case-by-case basis. The using agency should submit a scope-of-work to the respective vendor for a quote.

### Contract Does Not Cover

Products not within the scope of this or other statewide term contracts may be purchased from other vendors in accordance with [01 NCAC 05B.1105](#) and [01 NCAC 05B.0301](#).

### Mandatory Contract

This is a mandatory statewide term contract for state agencies, departments, institutions, universities, and community colleges, unless exempted by North Carolina General Statute. Additionally, non-mandatory entities, including schools and local government, which are allowed by general statute may use this contract.

### Special Note

**The goods and services offered that are included in this contract are to receive ordering priority to the extent those goods and services are not otherwise provided by Correction Enterprises or an existing statewide term contract.**

If a good or service awarded to a non-profit work center vendor is already covered by the aforementioned contracts, they may be ordered from vendors under this contract as a secondary option when the vendors on the primary contracts cannot provide them. For each occurrence, state entities are required to document that Correction Enterprises or the statewide term contract vendors, as applicable, were contacted and were unable to provide the good or service required. If the goods or services awarded are not available on an existing statewide term contract, the ordering priority will be Correction Enterprises, then awarded NPWCBSD vendors.

#### Division of Adult Correction, Department of Public Safety Products Preference (§ 148-134)

All agencies shall give preference to [Correction Enterprises products](#) when purchasing products. Contract items may be purchased from this contract only when it has been determined that Correction Enterprises cannot satisfy the requirement or item(s) will not be available when needed. The purchasing file should contain a waiver from Correction Enterprises stating that the item(s) cannot be supplied.

# Non-Profit Work Centers for the Blind

	<b>Statewide Term Contract Coverage</b> For products covered by an existing statewide term contract those contracts are to be given preference.
<b>Minimum Order</b>	The <a href="#">minimum order quantities</a> apply only to limited items from Eastern Carolina Vocational Center Inc.
<b>Equipment Installation</b>	<p>Installation of equipment or products shall be billed under the following conditions:</p> <ul style="list-style-type: none"><li>• The amount of the installation charge is identified in the vendor's catalog in conjunction with the equipment or products and related supplies.</li><li>• The buyer is provided an option to affirmatively accept or decline installation services at the time of ordering.</li><li>• Any approved charge is listed as a separate line item on the purchase order and invoice.</li></ul> <p>Vendors shall be responsible for the removal and disposal of all packaging materials, and any other debris resulting from the installation of the equipment or materials and related supplies from the buyer's location.</p> <p>Acceptance and approval of charges for installation of such items shall be at the sole discretion of the buyer. Any resulting damages to the item or to other state property during the installation by the vendor shall be repaired at the vendor's sole expense. General set-up activities needed to make an item ready for use (such as insertion of adjustable shelves into a bookcase or placing a desk chair onto its pedestal) shall not be considered installation and shall be included in the contract price.</p>
<b>Delivery Information</b>	<p>Standard delivery shall be made to the location specified by the buyer in the purchase order and be ready for use. The buyer may request a quote for an additional discount from the contract price when delivery other than the standard delivery requirements stated above may be required or desired.</p> <p>Standard Delivery:</p> <ul style="list-style-type: none"><li>• Eastern Carolina Vocational Center Inc. - 7 days</li><li>• Industries of the Blind Inc. - 3 days</li><li>• LC Industries - 7 days</li><li>• Lions Services Inc. - 30 days</li><li>• Winston-Salem Industries for the Blind (IFB Solutions) - 7 days, or 30 days for mattresses</li></ul>
<b>Return Policy and Restocking Fee</b>	<p>Vendor shall accept merchandise returns from buyers for a period of thirty (30) business days after delivery. Vendor shall provide full credit or full refund to buyers, whichever a buyer requests, within thirty (30) business days on all returns of an ordered product that is:</p> <ul style="list-style-type: none"><li>• A stock item in original packaging and in re-sellable condition</li><li>• Not a specialty or customized item</li></ul> <p>Equipment or products which are unacceptable because of quality problems, duplicated shipments, outdated product, damaged, or other issues related to vendor or product performance, shall be returned at vendor's expense within five (5) business days after receipt of notification from the ordering entity, with no restocking charge.</p>

STC 0002A – Goods and Services from NPWCBSO

Page 3 of 4

<b>Loaded into E-Procurement</b>	Yes, line item and ordering instructions are loaded in <a href="#">E-Procurement</a> .
<b>E-Procurement Help Desk</b>	(888) 211-7440
<b>Contract Administrator</b>	<a href="#">Nick Edwards</a> - 984-236-0217
<b>Contract Attachments</b>	<a href="#">Eastern Carolina Vocational Center, Inc</a> <a href="#">Industries of the Blind</a> <a href="#">LC Industries</a> <a href="#">Lions Services</a> <a href="#">Winston-Salem Industries for the Blind (IFB Solutions)</a>

STC 0002A – Goods and Services from NPWCBSO

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# Question and Answer Session

- Non-Profit Work Center for the Blind Provision Questions?



# Agency Procurement Plan (APP)



North Carolina  
Department of Administration  
Division of Purchase & Contract

Pamela Cashwell  
Secretary

David O'Neal  
State Purchasing Officer

August 17, 2021

To: All Deputy Secretaries, Chief Financial Officers, and Procurement Directors  
of State Agencies, Institutions, Community Colleges, and Universities

From: David O'Neal, State Purchasing Officer, Division of Purchase & Contract

Subject: Statewide Procurement Planning (FY 2022)

In accordance with NC General Statute 143-51, the NC Department of Administration's (DOA) Division of Purchase and Contract (P&C) is requesting a procurement plan from each agency's procurement department for fiscal year beginning July 1, 2021 and ending June 30, 2022. Agency procurement plans are due by close of business September 30, 2021.

NC General Statute 143-51 is as follows:

**RE: § 143-51. Reports to Secretary required of all agencies as to needs and purchases**

(a) It shall be the duty of all departments, institutions, or agencies of the State government to furnish to the Secretary of Administration when requested, and on forms to be prescribed by him, estimates of all goods and services needed and required by such department, institution, or agency for such periods in advance as may be designated by the Secretary of Administration.

(b) In addition to the report required by subsection (a) of this section, all departments, institutions, or agencies of the State government shall furnish to the Secretary of Administration when requested, and on forms to be prescribed by him, actual expenditures for all goods and services needed and required by the department, institution, or agency for such periods after the expenditures have been made as may be designated by the Secretary of Administration.

The purpose of the procurement plan is simply to gather high level procurement needs from all users, which will be aggregated and analyzed to determine the best procurement approach for each good or service identified. Some potential approaches include, but are not limited to, statewide term contracts, agency term contracts, spot buys, cooperative/partnership agreements or reverse auctions.

Your procurement plan should be a comprehensive summary of your agency's planned procurement needs and should be completed by consulting with business units and/or subdivisions. Instructions for how to complete your procurement plan can be found in the [Agency Procurement Plan Training](#), and the required tools can be accessed through the Procurement Information Portal (PIP).

For questions about your planned procurement events contact [pc\\_sourcing@doa.nc.gov](mailto:pc_sourcing@doa.nc.gov). For questions or difficulties with the procurement plan template or submission link contact [pc-systemssupport@doa.nc.gov](mailto:pc-systemssupport@doa.nc.gov).

Thank you

State of North Carolina | Purchase & Contract  
1303 Mail Service Center | 116 West Jones Street | Raleigh, NC 27699-1303

# Question and Answer Session

- Procurement Plan Questions?





# P&C Strategic Sourcing Team

- ReOrg
  - Agencies
  - State Term Contracts
- Vacancies
  - Procurement Request Timelines
- Reminders
  - Planning
  - Preparation/Quality
  - Communication

Service Team #1	Service Team #2	Service Team #3	Service Team #4
STM (Vacant) Wanda Simmons, SPS Daniel Lanning, SPS SPT, (Vacant)	Nick Edwards, STM Melinda Tomlinson, SPS SPS, (Vacant) Jordan Robbins, SPT	Bahaa Jizi, STM Sandy Anderson, SPS Linus Lee, SPS SPT, (Vacant)	Frank Slifer, STM Steve Hussey, SPS Myra Welch, SPS Robert Yelton, SPT
College of The Albemarle Department of Administration Department of Administration – State Board of Elections Department of Military and Veterans Affairs Department of Natural and Cultural Resources Department of Revenue Administrative Office of The Courts Department of Justice Department of State Treasurer Gaston College Office of The State Auditor Office of the State Controller Office of the Lt. Governor Community Colleges S - W	DHHS - Black Mountain Neuro-Medical Treatment Center DHHS - Broughton Hospital DHHS - Caswell Developmental Center DHHS - Central Regional Hospital DHHS - Cherry Hospital DHHS - Disability Determination Services DHHS - Division of Aging DHHS - Division of Central Administration DHHS - Division of Child Development DHHS - Division of Health Benefits DHHS - Division of Health Service Regulation DHHS - Division of Mental Health & Substance Abuse Services DHHS - Division of Public Health DHHS - Division of Services for the Blind DHHS - Division of Social Services DHHS - Division of Vocational Rehabilitation Services DHHS - Healthy Start Academy DHHS - J. Iverson Riddle Developmental Center DHHS - Julian F Keith ADATC DHHS - Longleaf Neuro-Medical Treatment Center DHHS - Murdoch Developmental Center DHHS - O'Berry Neuro-Medical Treatment Center DHHS - R.J. Blackley ADATC DHHS - Walter B. Jones ADATC Community Colleges D - J	Department of Environmental Quality Department of Information Technology Department of Insurance Department of Labor Department of Public Safety Department of the Secretary of the State Office of Administrative Hearings Office of the Governor The General Assembly NC Community College System Office UNC-NC School of Science & Math Community Colleges L - R	Department of Agriculture Department of Agriculture - NC State Fair Department of Commerce Department of Public Instruction Department of Transportation NC Wildlife Resources Commission NC Ports Community Colleges A - C

# What does this mean for you?

- July – You should be hearing from your Team Manager
  - Teams will finish out any current procurements
  - Important to submit your Procurement Plans
  - Establish recurring meetings
- Preparation & Quality of Procurements
  - Strategic Sourcing Communications 3-5 business days
- Challenges, Concerns, Recommendations
  - Team Manager, DSPO-SS

# Question and Answer Session

- P&C Strategic Sourcing Team Questions?



# Your Questions Answered!

Questions asked during this webinar will be compiled as FAQs and posted on the Procurement Information Portal on July 1.





## P&C Quarterly Updates Upcoming Webinars

- September 15, 2022, 10:00 a.m. - Noon
- December 15, 2022, 10:00 a.m. - Noon

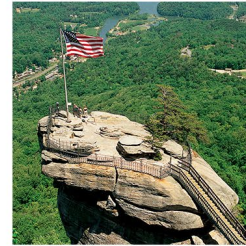
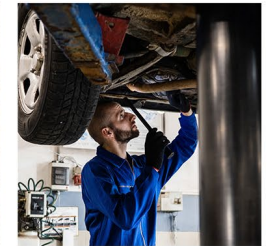
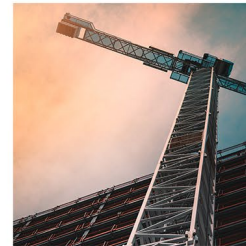
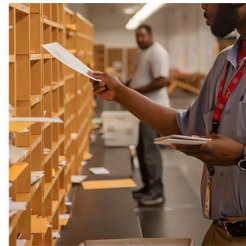
Want more information?

Contact P&C at 984-236-0210 for more details.



**PROCUREMENT 4:11**

# P&C Quarterly Updates Webinar Series June 2022



**NC★DOA**  
Department of Administration