



MONTGOMERY COMMUNITY COLLEGE

PURCHASING MANUAL

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MISSION

The mission of the Purchasing Department is to obtain supplies and equipment in a prudent and expeditious manner thereby contributing to the teaching effort and the learning process.

CODE OF CONDUCT

The Purchasing Department will always strive to:

1. Obtain maximum value for funds expended.
2. Comply with all laws, rules, regulations, policies, procedures and guidelines pertaining to the expenditure of funds.
3. Inform faculty, staff, and vendors of proper purchasing procedures.
4. Assist faculty and staff when needed by locating vendors, providing catalogs and price lists and helping to evaluate alternative products.
5. Create an atmosphere in which vendors feel they will be treated fairly and be given an equal opportunity to sell their goods and services.
6. Promote competition among vendors.
7. Protect the integrity of the Purchasing Department by refusing to accept gifts of gratuities which might influence or appear to influence purchasing decisions.
8. Conduct ourselves in a manner that will promote and protect the good public image of the College.

APPLICABLE LAWS, RULES, REGULATIONS, POLICIES, PROCEDURES AND GUIDELINES

TERM CONTRACTS

We are required by law to purchase supplies, materials and equipment from the vendors listed on the term contracts approved by the Department of Administration for the State of North Carolina. Term contracts are designed to serve the needs of all agencies, public schools, universities, community colleges and certain non-state agencies. These contracts are established through the competitive bidding procedure. When it is necessary to amend, modify, or cancel all or parts of an active term contract, all users of that contract are notified. The Statewide Term Contract Listing is found at www.doa.state.nc.us/PandC/.

DEPARTMENT OF PUBLIC SAFETY (CORRECTION ENTERPRISES)

North Carolina has a preference statute (G.S. 148-70) that controls the sale of prison industry products and prohibits their sale to the private sector. All agencies should give preference to the Department of Correction products in purchasing articles, products and commodities which are needed and which are manufactured or produced within the State prison system and offered for sale to them by the Department of Correction. This preference requirement also applies to all community colleges (except printing). Delegation limits do not apply to products purchased from Correction Enterprises.

Products available from the private sector and also offered by Correction Enterprises, including those on term contracts, shall be purchased from the private sector only when it is determined that the Correction Enterprises product will not satisfy the requirement or will not be available when needed. The purchase file should obtain documentation from Correction Enterprises stating that the item(s) cannot be supplied. Competitive bidding shall not apply to articles of commodities available from Correction Enterprises.

PURCHASING FLEXIBILITY

A term contract is not an “approved list”. It is a legally binding agreement between the State and the awarded vendor to buy and sell certain items at certain prices for a specific period of time. A term contract is not a list of “ceiling” or “approved” prices. It is now legal for agencies, public schools, universities, community colleges and certain non-state agencies to purchase contract items, such as supplies, materials, or equipment, from other sources at lower prices within the agency’s delegation. Montgomery Community College has a delegation limit of \$10,000. (The items must be substantially similar with respect to manufacturer, model, style, etc.) This information MUST be documented on the Requisition.

NON-CONTRACT ITEMS

Purchases with a cost requirement of \$10,000, or more, including tax and shipping, must be requisitioned and bid through the Division of Purchase and Contract. These requirements must be approved by the Board of Awards. Purchases with a cost requirement under \$10,000 do not require approval of the Purchase and Contract Division. The Montgomery Community College Purchasing Department will issue a purchase order after adequate quotations have been received. The process for submitting items for bid under \$10,000 is included on page 4.

GENERAL STATUTES

G.S. 143-3 Funds from Different Sources

All funds, special, federal, local, gifts, bequests, receipts, fees, etc., as well as State appropriated, used for the purchase of equipment, materials, supplies and services shall be handled under the provisions of Article 3 of Chapter 143 of the General Statutes and in accordance with procedures established pursuant thereto by the Division of Purchase and Contract.

G.S. 143-48 State Policy: cooperation in promoting the use of small minority, physically handicapped and women contractors; purpose; required quarterly reports.

- (a) It is the policy of this State to encourage and promote the use of small, minority, physically handicapped and women contractors in State purchasing of goods and services. All State agencies, institutions and political subdivisions shall cooperate with the Department of Administration and all other State agencies, institutions and political subdivisions in efforts to encourage the use of small, minority, physically handicapped and women contractors in achieving the purpose of this Article, which is to provide for the effective and economical acquisition, management and disposition of goods and services by and through the Department of Administration.
- (b) Every governmental entity required by statute to use the services of the Department of Administration in the purchase of goods and services and every private, nonprofit corporation other than an institution of higher education or hospital that receives an appropriation of five hundred thousand dollars (\$500,000) or more during a fiscal year from the General Assembly shall report to the Department of Administration quarterly on what percentage of its contract purchases of goods and services, through term contracts and open-market contracts, were from minority-owned businesses, what percentage from female-owned businesses and what percentage from disabled-owned businesses. The same governmental entities shall include in their reports what percentages of the contract bids for such purchases were from such businesses. The Department of Administration shall provide instructions to the reporting entities concerning the manner of reporting and the definitions of the business referred to in this act.

- (1) A business in one of the categories above means one:
 - a. In which at least fifty-one percent (51%) of the business or of the stock in the case of a corporation, is owned by one or more persons in the category; and
 - b. Of which the management and daily business operations are controlled by one or more persons in the category who own it;
- (2) A female or a disabled person is not a minority, unless the female or disabled person is also a member of one of the minority groups described in G.S. 143-128(c)(2)a through d; and
- (3) A disabled person means a “handicapped person” as defined in G.S. 168A-3(4).

G.S. 143-55 Requisitioning for Supplies by Agencies: Must Purchase Through Sources Certified.

After sources of supply have been established by contract and certified by the Secretary of Administration to the said department, institutions and agencies as herein provided for, it shall be the duty of all departments, institutions and agencies to make requisition or issue orders on forms to be prescribed by the Secretary of Administration, for all supplies, materials and equipment required by them upon the sources of supply so certified, and except as herein otherwise provided for, it shall be unlawful for them, or any of them, to purchase any supplies, material or equipment from other sources than those certified by the Secretary of Administration. One copy of such requisition or order shall be furnished to and in the time frame requested by the Secretary of Administration.

G.S. 143-58.1 Use of State Purchasing Power for Private Gain

The purchasing power of the State shall not be used for private advantage or gain. Purchases under contracts made by the State are not to be allowed for personal use out of private funds, nor are agencies or institutions to place orders for articles for ownership by employees or other individuals. A violation of this section is a misdemeanor, punishable by fine, imprisonment up to two years, or both, in the discretion of the court.

REQUISITION/PURCHASE ORDER PROCESS

- Faculty/Staff member (requestor) completes requisition (Appendix A) online in Etrieve. If the purchase is \$5,000.00 to less than \$10,000.00, the requestor obtains and attaches completed IFB/RFP/RFQ (Appendix C) documentation or requests Purchasing Officer to submit an Informal Quote Request Form and forwards to next level for approval.
- Approval by Department Chair in Etrieve and forward to next level.
- Approval by Dean and/or VP in Etrieve and forward to next level.
- Approval by VP of Administrative Services in Etrieve and forward to Purchasing Officer upon verification of sufficient funds for budget code.
- Purchasing Officer verifies budget code and proper purchasing procedures for each individual requisition, reviews attached IFB/RFP/RFQ documentation or submits Informal Quote Request Form and verifies as needed.
- Purchasing Officer enters requisition into NC E-Procurement or Colleague and prints out purchase order. The order is submitted electronically through the NC E-Procurement System or processed accordingly if through Colleague.
- Purchasing Department keeps a copy of original requisition, original purchase order, and any quotes. Then uses Etrieve to send Department copy to requestor and the Accounts Payable Specialist.
- When goods are received, they are checked against purchase order, and if correct, routed to person placing the order. If major equipment, equipment bar code tag is attached by Equipment Coordinator and item is entered in Fixed Assets.

- Invoices are checked against purchase order and items are received by Purchasing Officer and then given to Accounts Payable Specialist to approve for payment. The Accounts Payable Specialist keeps the receiving copy of the purchase order, the purchasing copy of the requisition, any other documentation attached, all packing receipts, and a copy of the invoice marked "DUPLICATE/DO NOT PAY."

BID PROCESS FOR ITEMS NOT ON STATE CONTRACT

For an order up to \$5,000, no bid process is necessary; however, the Purchasing Department reserves the right to check for lower prices if the cost seems unreasonable.

NOTE: MCC employees are encouraged to obtain additional quotes (whenever possible) for commodities, when the individual item costs between \$500.00 and \$5,000. Although this is not mandatory, it is encouraged as a good purchasing practice. Be sure that all vendors making a quote have identical specifications in writing.

For orders costing \$5,001 to \$10,000, including tax and shipping, only written quotes are acceptable. The requestor will acquire the proper quotes using state mandated IFB/RFP/RFQ Forms (Appendix C). The requestor may also have the Purchasing Officer submit an Informal Quote Request Form. In order to submit an Informal Quote Request Form, the requestor must supply the complete specifications for the item or items, three vendor names known to supply the requested items, and any other information that would be helpful to obtain quotes. Requisitions requiring written quotations or bids will require additional time for preparation of specifications and solicitation of quotations or bids.

For any order that exceeds \$10,000, including tax and shipping, a requisition, complete with clear and concise specifications, will be sent to the Purchase and Contract Division in Raleigh by the Purchasing Officer. This process normally takes four to six weeks.

EMERGENCY AND PRESSING NEEDS

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, or unanticipated volume of work; while emergencies are defined as situations which endanger lives, property or the continuation of a vital program and which can be rectified only by immediate on-the-spot purchases or rental of commodities, printing or services.

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 P&C, unless circumstances prohibit their use.

When emergency or pressing need action is necessary, and the expenditure is over the agency's benchmark or delegation, prior approval shall be obtained from P&C if time permits.

If the expenditure is over \$10,000 for agencies (regardless of their delegation), or over a college's benchmark, an explanation of the emergency or pressing need purchase shall be reported in writing to P&C. P&C shall report such purchases of commodities and printing to the Board of Award as a matter of record.

UNAUTHORIZED PURCHASING

College employees may be held personally responsible for unauthorized purchases. In all cases, applicable legal requirements, good purchasing practices and all procedures as specified in the MCC Purchasing Manual are to be followed.

PURCHASE REQUISITIONS

CONTRACT ITEMS

The State of North Carolina has established contracts for many types of equipment and supplies. Items listed on state contract must be purchased from the vendor(s) listed, unless there is sufficient justification to buy elsewhere. (Purchasing Flexibility allows Community Colleges to purchase contract items off contract, providing that the price is lower than the contract price, and the item is similar/identical with respect to manufacturer, model, style, etc. This information MUST be documented on the Requisition) Copies of the state contract can be found on the Internet at <https://ncadmin.nc.gov/statewide-term-contracts> (please add this address to your bookmarks). Some catalogs and price lists are also available in the Purchasing Department.

NON-CONTRACT ITEMS (COMMODITY ITEMS)

If your requirements are not listed on any of the state contracts, list in the space provided on the requisition, the name, address, etc., of three known sources. The requestor may obtain quotes from these and/or other sources using the state mandated IFB/RFP/RFQ (Appendix C) documentation or request the Purchasing Officer to submit an Informal Quote Request Form. In order to submit an Informal Quote Request Form, the requestor must supply the complete specifications for the item or items, three vendor names that supply the requested items, and any other information that would be helpful to obtain quotes. The Purchasing Department does not normally process requisitions on a "sole source" basis. We attempt to find several sources.

PREPARING THE PURCHASE REQUISITION

There are several items on the purchase requisition that must be completed in Etrieve. A properly and thoroughly prepared requisition moves through the purchasing process more quickly than one that is not properly and thoroughly prepared. Items that *must* be completed:

1. Vendor Information: Name, Contact Person, Address, and Phone. Go to MCC website <https://www.montgomery.edu/> click on Info For, Faculty & Staff, NC E-Procurement, Public Vendor Search, type in your vendor's name. If vendor is not registered, search for a comparable vendor and/or contact the Purchasing Officer. Detailed vendor search instructions can be found in Appendix B.
2. Requestor Information: Name, Date Issued, and Date Required.
3. Line item # (1, 2, 3, 4, etc.)
4. Quantity: The number of units you wish to order.
5. U/M: Unit of Measure (each, lot, pound, box, pack, dozen, etc...written as ea, lt, lb, bx, pk, dz, etc.)
6. Detailed Description: The purpose of the detailed description is to tell the Purchasing Department what you want. In addition to stating what the item or service is, give any other information that will further describe the item, such as model number, size, color, weight, class, stock number, catalog number, manufacture number, etc.

7. Cost: Unit price of the item or service (numbers only, no symbols such as \$ sign)
8. Commodity Code: If the commodity code is listed on the contract, please include it on the requisition. Otherwise, the Purchasing Officer will assign the commodity code.
9. GL Account Number: Departmental Budget Code associated with type of purchase (supplies, equipment, repair, etc.)
10. Shipping Cost: Most vendors will charge shipping...cost can be estimated.
11. Tax: Calculate the tax on the total order including shipping...MCC is not tax exempt. Out-of-state vendors do not typically charge NC sales tax; however, we still have to pay sales tax to NC Dept. of Revenue.
12. Comparison: If the items or service being requested are not on state contract and you estimate the total cost of items on the requisition to be more than \$5000, but less than \$10,000, attach three quotes to the requisition in Etrieve or e-mail the quotes to the Purchasing Officer. The Purchasing Officer will seek quotes from additional vendors when it is advantageous to do so.
13. Explanation: List the purpose for needing to purchase the items or service.
14. Vendor Notes: Each state contract has a certification number. The number can be found near the top of the page on all state contracts. If it is a state contract item, the requestor should fill in the contract number.
15. Approvals: When supplies and equipment are being requested in Etrieve, the requisition will be forwarded to the next level for approval; the Department Chair, the appropriate Dean, and Vice Presidents. Requisitions that have not been properly prepared and approved will be denied and returned to the individual making the request.

COMMON ERRORS MADE BY INDIVIDUALS SUBMITTING REQUISITIONS

1. Fill in complete and correct Budget Code. If correct budget code is unknown, the Vice President of Administrative Services will code.
2. Calculate shipping charges.
3. Add NC sales tax to all items except:
Subscriptions
Memberships
Contractual Services
4. All memberships must spell out on the application form or invoices: Institutional membership. No individual memberships are allowed.
5. Keep all copies of requisitions and purchase orders for future reference. When inquiring about an order status, give the P.O. number as indicated in the upper right hand corner.
6. Enter requisition in Etrieve accurately with complete description and item number.
7. Check quantity and unit price and totals.
8. Orders are not to be submitted verbally without a purchase order or an emergency purchase order number. If an item is an emergency, clear the purchase with your Dean/VP and call the Purchasing Department for an emergency P.O. number. Complete your requisition as normal, marking it as confirming and showing the emergency P.O. number.
9. If an item or items are received direct by you through the mail, notify the Purchasing Officer at once with the purchase order number and date of receipt. These items cannot be paid unless the Purchasing Officer is notified.
10. The appropriate Dean, Vice President, and the Vice President of Administrative Services must sign/approve in Etrieve all requisitions for supplies and equipment.

PURCHASE OF FURNITURE

Furniture (desks, chairs, bookcases, lounge, computer and library) is included on state term contract 420A. Go to <https://ncadmin.nc.gov/statewide-term-contracts> to view the contract.

PURCHASE OF CARPETING

State Term Contract 360A is a guideline on ordering carpet, installation, cove molding, removal and disposal of carpet and other additives that may be needed for carpet. All carpet should be in compliance with North Carolina Specifications. A Quality Assurance Inspection by a qualified expert must be conducted when the cost exceeds \$2,500.00 as specified in the term contract and an Inspection Report Form completed.

MOTOR VEHICLE ACQUISITION

Motor Vehicles are found on State Term Contract 070A.

PURCHASE BY PROCUREMENT CARD (P-CARD)

When a small purchase needs to be made using the College procurement card, a Purchase Requisition must be submitted in Etrieve. The Procurement Card Manual can be viewed on Google Drive.

TRADE-IN ALLOWANCES

Under some conditions for some types of items it may be more advantageous to the State to seek to trade in used property against the purchase of a replacement. Before an agency makes any final decision to trade in an item, the State Surplus Property Office shall be contacted for guidance and approval.

Where an agency solicits competition for the purchase of a new item and it appears that a trade-in may be advantageous, the solicitation shall contain a provision requesting that a trade-in allowance be offered and prior approval by the State Surplus Property Office is required.

In the disposition of State surplus property, the State Surplus Property Office gives first priority to transfer to other agencies of the State. Second priority is given to transfer to political subdivisions and qualified non-profit organizations within the State. Property thus transferred must be for the use of the recipient agency, political subdivision or qualified non-profit organization with title being in such agency, unit or organization. In making transfers, the price shall be one mutually agreeable to the owning agency and the recipient and approved by the State Surplus Property Office as being a fair market price based where possible on previous sales of similar products in the open market. State surplus property transferred to any political subdivision or nonprofit organization must be retained by the unit or organization not less than 12 months before disposal, unless the property becomes unusable for the purpose intended.

PURCHASE OF USED ITEMS

If it appears that the acquisition of used equipment, materials or supplies is in the public interest, competitive procedures shall be followed wherever feasible.

The solicitation document may or may not include a request for prices on like new products, but in either case acquisition may be made on the basis of that which is considered most advantageous for the intended purpose.

BLANKET PURCHASE ORDERS

All blanket orders must have a start date at the beginning of the fiscal year 7/01/XX and an expiration date of 6/30/XX, end of the fiscal year.

The requestor should determine the dollar amount needed for the year. If the total is over \$5,000, the requestor and/or Purchasing Officer will get formal, written bids. The end-user will need to provide a list of 10-15 items that they anticipate using. It will be a basis for cost comparison only.

All blankets should list names of employees eligible to make purchases from the blanket order. All blankets should have a “not to exceed” amount for each order against the blanket.

PURCHASE OF EQUIPMENT

Equipment items with a net cost (price-discount+tax+freight) of \$500 or less per unit should be purchased with supply funds unless the item is considered to be subject to “walking away”, i.e. laptop, tablet, etc. Equipment monies may also be used for furniture, equipment or high risk items costing between \$500-\$999.99 (including tax and freight) only if the monies are charged to minor equipment. (The final decision on this will rest with Administration.) Equipment items with a net cost (price discount + tax+ freight) exceeding \$1000 per unit must be purchased with equipment funds only.

Note: Before any equipment is moved (to another location, bid sale, storage), the Asset Change Form must be completed – found on the Montgomery Community College website, Faculty & Staff, Etrieve, Asset Change Form.

PURCHASE-LEASE OF COPIERS

Copiers – Purchase, Rental and Maintenance can be found on Statewide IT Term Contract 204D, at <https://it.nc.gov/resources/it-strategic-sourcing/statewide-it-contracts>

PURCHASE OF COMPUTER SOFTWARE

Most computer software must be purchased from supply monies. The only exception is operational software necessary to run the computer may be purchased with equipment monies. Contact the Accountant/VP of Administrative Services if you are unsure which fund can be used.

PURCHASE OF AUDIO VISUAL SUPPLIES AND MATERIALS

Audio Visual items such as DVDs, charts, maps and exhibits may be purchased with supply funds or library book budget funds. Sets of anything are considered one item. Items in excess of \$10,000 must be approved by Purchase and Contract Division.

ITEMS ORDERED FOR “PREVIEW” PURPOSES

A requisition must be filled out and approved for items to be ordered for preview. This requisition must show the terms for that company for previewing their materials. This can be done by notation on the requisition or a copy of the company’s preview policy stapled to the back of the requisition. On a preview requisition, the cost should show a zero “0”. If the decision is made to purchase the item(s) previewed, a second requisition must be completed showing the cost of the item(s). This must be done within the time frame of the preview policy of that particular company.

INSPECTION AND TESTING

In general, it is the responsibility of the agency to inspect all materials, supplies and equipment upon delivery to ensure compliance with the contract requirements and specifications. However, when the item costs \$10,000.00 or more, an Inspection Report Form is to be completed by the agency and filed with the Purchase Order. The Inspection Report is located at [Sample Inspection Report](#)

When samples (i.e. carpet) are required in response to a solicitation document issued by P&C, then P&C will review those samples and test as appropriate. Samples shall not be sent directly to laboratories outside P&C or the agency unless authorized in writing by P&C

For items requiring an Inspection Report Form, visit <https://www.waketech.edu/sites/default/files/page-file-uploads/Quality%20Acceptance%20Inspection%20Product%20List%20Rev%201.pdf> The list identifies only those items that routinely need a Quality Acceptance Inspection PRIOR to release of final payment. An Inspection Report Form shall be mandatory when the item costs \$10,000.00 or more and the bid is submitted by P&C.

COMPLAINT TO VENDOR

“Complaint to Vendor” form is used by state agencies and schools to inform vendors and the State of North Carolina Purchase and Contract Division of problems encountered with quality, service, or delivery of items ordered.

When a vendor repeatedly gives poor service and/or delivers merchandise that does not meet specifications to the extent that work is hampered, forward your complaint to the Purchasing Department. The complaint must be in a written memo or letter form. Please make the complaint specific. The Purchasing Department will complete the complaint form from your memo or letter and forward it to the Purchase and Contract Division, or will take the appropriate action directly with the vendor. Departments are urged to make written complaints when justified to the Purchasing Department.

If a vendor receives an excessive number of complaints, Purchase and Contract may not consider this vendor as a supplier when new contracts are negotiated. The Purchasing Department may not consider purchasing from this vendor if there are other suppliers listed by P & C. This information is also retained and analyzed when sending future bid specifications.

CHANGES TO PURCHASE ORDERS

A purchase order written to a vendor by the Purchasing Department in response to an offer by the vendor and based on acceptable terms and conditions is a binding contract and cannot be broken by either party so long as both parties live up to the terms and conditions of the agreement. To break or cancel the contract requires the consent of both parties.

When a purchase order is not in accordance with the terms and conditions, which are previously offered by the vendor, it does not become a binding contract until the purchase order is acknowledged and accepted by the vendor in writing. Changes to purchase orders already accepted by vendors must be requested by the Purchasing Department. Most vendors are willing to make reasonable changes to an order without penalty to the purchaser. Generally, only when a vendor may have expended funds for fabricating special equipment will a charge be assessed for changing or canceling an order.

Any department needing to make changes to an order should advise the Purchasing Department either in writing or by telephone. Changes such as terms and conditions, price cancellations, quantities, or substitutions must be done with the knowledge and approval of the Purchasing Department. The Purchasing Department may ask the requesting departments for written authorization before changes are made.

EXPEDITING, FOLLOW-UP, AND TRANSACTION INQUIRIES

When a purchase order is placed with a vendor, the Purchasing Department places a copy of the purchase order in an open order file. If the vendor does not ship according to the estimated schedule, an inquiry is forwarded to the vendor by the Purchasing Department. When materials are not received according to the promised shipping schedule, requesting departments may ask the Purchasing Department to inquire about the status of the order.

POLICY ON RETURN OF MERCHANDISE TO VENDOR

The Purchasing Department must be contacted in all situations when it is necessary to return a purchase to a vendor. Merchandise should not be returned to a vendor for any cause until first contacting the Purchasing Department to determine that the vendor's permission and shipping instructions have been received. It is not the intent of this policy to discourage technical communication between the user and the vendor.

A memorandum to the Purchasing Department stating essential information is required. That essential information is:

1. Purchaser Order Number
2. Vendor Name
3. Item Number on Purchase Order
4. Name of item to be returned
5. Quantity to be returned
6. Reason for return
7. Whether a replacement or a refund is to be requested

Since the return of merchandise can be for a number of reasons, such as in-warranty or out-of-warranty repairs, incorrect or defective materials, or over shipment, the financial responsibility will depend on the reason for the return. Generally, when materials are returned as a result of an error by the vendor or because materials are defective, freight charges or other direct cost involved is the responsibility of the vendor. Otherwise, the department for which the return is being made must bear the cost involved. Most vendors will charge at least a 20% restocking charge when merchandise is returned because of an over-purchase or in the case of institution error.

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 must be handled by or with the knowledge and approval of the Purchasing Department. During correspondence between department and vendor, no terms and conditions of the order, including destination of shipment, may be changed; additional items may not be added to the order nor may any part of the order be cancelled. Any changes in an issued purchase order must be made by the Purchasing Department.

SOLICITATION BY SALESPEOPLE

State policy requires that supplies and materials be obtained from state contracts or by competitive bidding (except for certain small orders). Therefore, solicitation of business by salespeople is limited to the demonstration and discussion of products, prices, and services. Replies to vendor solicitation should question whether item is on state P & C and whether vendor is registered with state P & C. When conversation with salespeople leads to a purchase requisition, information obtained from the salesperson (i.e. prices, delivery, etc.) should be noted on your requisition, including the salesperson's name and the date information was obtained. It must be made clear to the salesperson(s) that no shipment is to be made until a formal purchase order is received by them or their company.

It is not permissible for a department to receive materials on consignment pending issuance of a confirming purchase order. Receipt of equipment for demonstration purposes is permissible provided there is no commitment or obligation to purchase the equipment. Liability for demonstration equipment must be borne by the vendor. Shipping charges, both to and from the College, are the vendor's responsibility.

It is recommended that all solicitation by telephone or in person be referred to the Purchasing Department.

AVOIDING CONFLICT OF INTEREST

Employees shall disclose to their supervisor, within the administrative area to which they are assigned, any potential conflict of interest of which they are aware related to the purchase of equipment, materials, goods, or services. Except in very unusual circumstances, the College will not purchase equipment, materials, goods, or services from an employee, a member of an employee's immediate family, or a business in which an employee or a member of an employee's family has an ownership interest. If an exception is necessary, the area supervisor must submit a written disclosure of the transaction with the purchase requisition.

ETHICS

All public, purchasing personnel shall be entirely cognizant of the necessity of ethical behavior. Personnel cannot accept anything of monetary value, including food and beverages. Everyone 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. Employees or other individuals will not process orders for articles of 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.

PRODUCT AND SERVICE DEMONSTRATION BY VENDORS

DEMONSTRATION REQUESTED BY VENDOR

From time to time vendors request that they be allowed to demonstrate a new product line or a new service. MCC does not prohibit this type of demonstration. However, since space in a building or in a

parking lot must be provided, clearance must be obtained from the department head of the department receiving the demonstration and the Dean/VP of that division.

Vendors are to direct any requests for demonstration to the Purchasing Department. If approved, the Purchasing Department will make arrangements for the demonstration (including setting a time, advising those departments which might have an interest in the demonstration, and confirming with the vendor the arrangements that have been made.) The vendor will be responsible for all expenses incurred in the demonstration. The College will not accept any responsibility for the safety of the vendor's equipment beyond normal care and safety.

DEMONSTRATION REQUESTED BY DEPARTMENT

A more common type of demonstration is one that is requested by a department for a vendor to demonstrate a particular piece of equipment. In these instances, the arrangements are worked out between the requesting department and the vendor, with the knowledge of the Purchasing Department. All expenses incurred from these demonstrations are the responsibility of the vendor and the College will not accept any responsibility for the safety of the equipment beyond normal care and safety.

EVALUATION OF EQUIPMENT

The MCC Purchasing Department must be notified prior to any installation of vendor's equipment for the purpose of evaluation. This is required for the financial protection of the department and institution.

If a vendor offers equipment to be installed for evaluation, the following criteria applies:

1. MCC is in no way obligated to purchase or lease the equipment after evaluation.
2. The department receiving the equipment for evaluation is not authorized, either expressed or implied, to commit MCC to purchase or lease the equipment after evaluation.
3. Equipment must be adequately identified as belonging to the vendor during the evaluation period.
4. Any evaluation contract, permission/release sheet, or receipt of goods slip must be reviewed, and if deemed appropriate, signed by the MCC Purchasing Department.
5. The vendor is responsible for all costs incurred prior to, during, and after the evaluation. Equipment insurance is the responsibility of the vendor. MCC assumes no liability for the equipment.
6. At the end of the evaluation period, the evaluating department is responsible for crating and shipping the equipment back to the vendor. The vendor is responsible for furnishing all crating/packing material and return freight charges.
7. Vendors cannot use the name of MCC or the evaluating department of MCC in any advertisements or endorsements.

RECEIVING

All supplies, materials, and equipment being delivered to Montgomery Community College will be received by the Purchasing Department. Packages will be opened to verify contents and the condition of contents. Packages will then be delivered to the requestor. Personal packages should not be addressed to MCC. Only in unusual circumstances and pre-approval by Purchasing will delivery be accepted of a personal package. It is your responsibility to pick up personal packages in a timely manner. Purchasing is not responsible for any damage or loss to personal packages. Questions

concerning deliveries should be directed to Purchasing.

REPAIR OF IN-WARRANTY EQUIPMENT

New equipment is normally warranted by the manufacturer for a period of time against faulty parts or workmanship. Such equipment is generally supplied with a warranty card which should be completed and returned to the manufacturer as soon as the equipment is received. (A copy should be kept with the file on the equipment.) Unless this warranty card is returned promptly, some manufacturers will not accept liability for the repair or replacement of the equipment. The manufacturer is legally responsible for replacement or repair only if the defective equipment is returned to an authorized repair center, freight prepaid. Sometimes only the defective part is replaced at no charge, and replacement labor costs may be charged to the customer.

A request for in-warranty service for all types of equipment should be referred to the vendor by the Purchasing Department. With your service request, furnish the number and date of the purchase order and the nature of the defect. The Purchasing Department will communicate with the vendor for instructions on handling the warranty repair. After shipping instructions have been obtained from the vendor, the Purchasing Department will be responsible for returning the equipment to the vendor. The vendor repairing/replacing the equipment will return it directly to the Purchasing Department.

REPAIR OF OUT-OF-WARRANTY EQUIPMENT

It is sometimes necessary to have highly technical equipment repaired by the vendor or other service agency. Excessive downtime for this type of equipment can be costly. If funds are available, consideration of carrying a maintenance contract may be beneficial. Request for out-of-warranty service on equipment covered by a maintenance contract are made directly to the service facility by the requesting departments. Out-of-warranty repairs or service may be obtained in the following ways:

1. **Emergency Repairs:** When emergency repairs are necessary, upon verbal approval of the Dean/VP of that division, the Purchasing Department may assign an emergency purchase order number for the repair request and authorize the requesting department to contact the service facility prior to submitting a requisition.
2. **Non-Emergency Repairs:** If repairs are not urgent, a requisition should be submitted showing an estimated cost of repair and, upon approval, a purchase order will be issued.

Request for out-of-warranty repair that must be returned to the manufacturer or vendor must be submitted on a requisition form, describing the nature of the repair/problem, indicating the name of the vendor, shipping instructions, and an estimate of the cost. The equipment to be returned for repairs should be sent to the company by the Purchasing Department in accordance with their shipping instructions.

MOTOR VEHICLE SERVICE AND REPAIR

The Maintenance Department requisitions services of the college owned vehicles (not instructional vehicles).

PURCHASE OF FUEL

When a college owned vehicle is signed out for use through the Accounts Payable Specialist, he/she will ask for the odometer reading on the vehicle. All receipts shall be turned in to the Accounts Payable Specialist when the keys and/or P-Card are returned.

Enterprise Rental is also available under State Term Contract 975B. The Accounts Payable Specialist will reserve the vehicle when requested.

SALES TAX

Sales Tax made payable to the North Carolina Department of Revenue shall be added to the cost of the fixed asset purchase.

MAINTENANCE SERVICE CONTRACTS

Service or maintenance contracts are sometimes the most economical method for maintaining equipment. Specialized equipment is normally best maintained by the original manufacturer or their service agency. It is advisable to consider having this covered by a maintenance contract. Parts and supplies are not usually covered by the maintenance contract, but the savings on service calls and labor charges may make the lump sum payment for this type contract reasonable.

A service or maintenance contract is initiated by submitting a requisition and justification to the Dean/VP of your division. Parts or supplies not covered by the maintenance contract require a separate confirming requisition. When equipment is covered by a maintenance contract, service may be requested by the using department directly to the service agency.

SURPLUS PROPERTY

The Department of Administration is responsible for administering the sale and disposal of surplus equipment, materials, and supplies for agencies. The administration of this program has been delegated by the Secretary to the SPO.

There are two agencies within P&C that administer this surplus property program. The State Surplus Property Office is responsible for State surplus property. The Federal Surplus Property Office is responsible for disposal of Federal surplus property.

The State Surplus Property Office shall determine the means for disposal or transfer of all State owned property. State agencies shall notify the State Surplus Property Office of any personal property that is surplus to their needs by completing the equipment disposal form.

THE HISTORICALLY UNDERUTILIZED BUSINESS UTILIZATION POLICY FOR MONTGOMERY COMMUNITY COLLEGE

Historically Underutilized Business (HUB) is any one of the following: a minority owned business, a female-owned business, a disabled owned business, a disabled business enterprise, a non-profit workshop for the blind or severely disabled.

Montgomery Community College will seek bids from HUB vendors on purchases, service, and construction in accordance with legislative rulings. When HUB vendors give the best price for the commodity required, they will be given the order without regard to their race, gender, or handicap. In small purchases where prices and quality are equal, preference will be given to the HUB vendor both in state contract purchases and in open market purchases. HUB vendors will be selected from the lists provided by the Division of Purchase and Contract and the HUB program. Montgomery Community College's objective is to meet or exceed the minimum goal of ten percent when averaged on an annual basis.

BUY RECYCLED INITIATIVE

For many years, Montgomery Community College has endeavored to purchase goods having recycled content (post-consumer waste). Although many commodities containing post-consumer waste typically cost a little more. We, as a state agency, feel it is important to support this initiative, in order to preserve our resources. We encourage our employees, as they research purchases, to be mindful of products with recycled content (usually marked with the recycle emblem in catalogs) and to select those items, whenever possible.

COORDINATORS:

Goods and Services – Purchasing Officer, Equipment Coordinator
Accountant
Accounts Payable Specialist



Purchase Requisition

Name	Employee ID	Department	Supervisor
<input type="text" value="REDACTED"/>	<input type="text" value="REDACTED"/>	Arts & Sciences	Dean
			Purchase Requisition # 23206
			Purchase Order # 22768

Vendor Information

Vendor	Vendor ID
Mckesson	E-Procurement

Contact

Address

City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>

Requestor Information

Requested By	Date Issued	Date Required
<input type="text" value="REDACTED"/>	2018-08-09	2018-08-24

Line #	Qty	U/M	Cost	Code	Total
1	2	cs	\$ 44.71	20142	\$ 89.42
Description		#48611310 McKesson Mfr# 14-686 Nitrile disposable gloves, medium; box of 100			
2	1	cs	\$ 44.71	20142	\$ 44.71
Description		#46881310 McKesson Mfr# 14-688 Nitrile disposable gloves, large; box of 100			
3	1	cs	\$ 44.71	20142	\$ 44.71
Description		#46841310 McKesson Mfr# 14-684 Nitrile disposable gloves, small; box of 100			
4	1	cs	\$ 44.71	20142	\$ 44.71
Description		#46901310 McKesson Mfr# 14-690 Nitrile disposable gloves; x-large; box of 100			

+ Line Item Total \$ 223.55

GL Account Number	Line #	Amount
11-220-97-523000- XXXXXX	1-4	\$ 239.19

+ Accounts Total \$ 239.19

Shipping \$ 0.00
Tax \$ 15.64
Total \$ 239.19

Explanation

Restock Lab

Vendor Notes

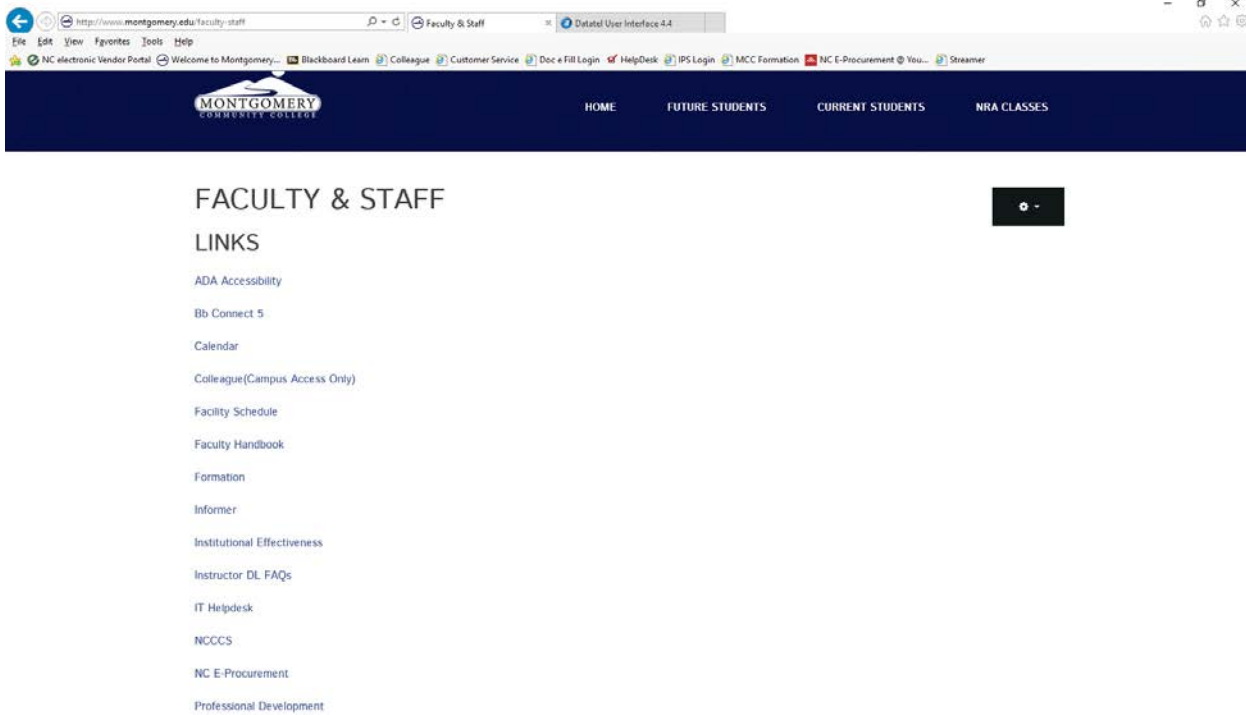
Free shipping
If lower price found; please list Purchasing Flexibility information here ...refer to MCC Purchasing Manual p.2.

Comments

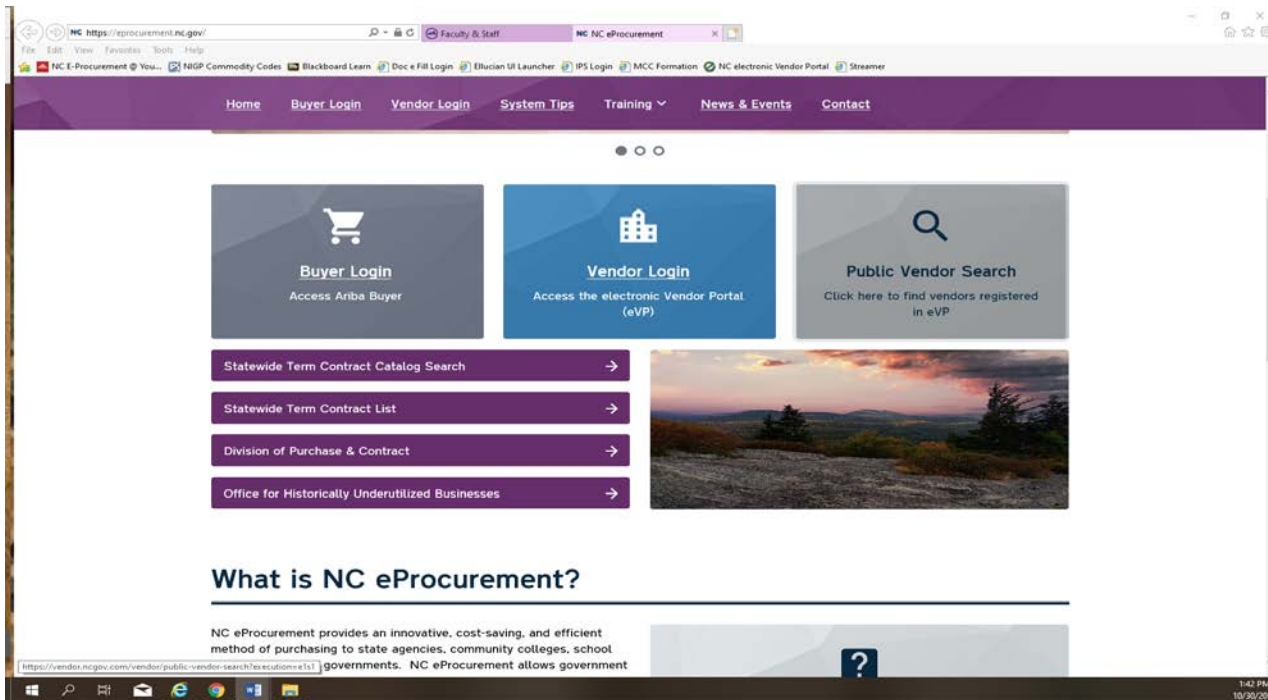
User>Supervisor>Dean>VP>VP Administrative Services>Purchasing Admin>Accounts Payable Admin>Archive

Is the vendor on NC E-Procurement? Here's how to find out...

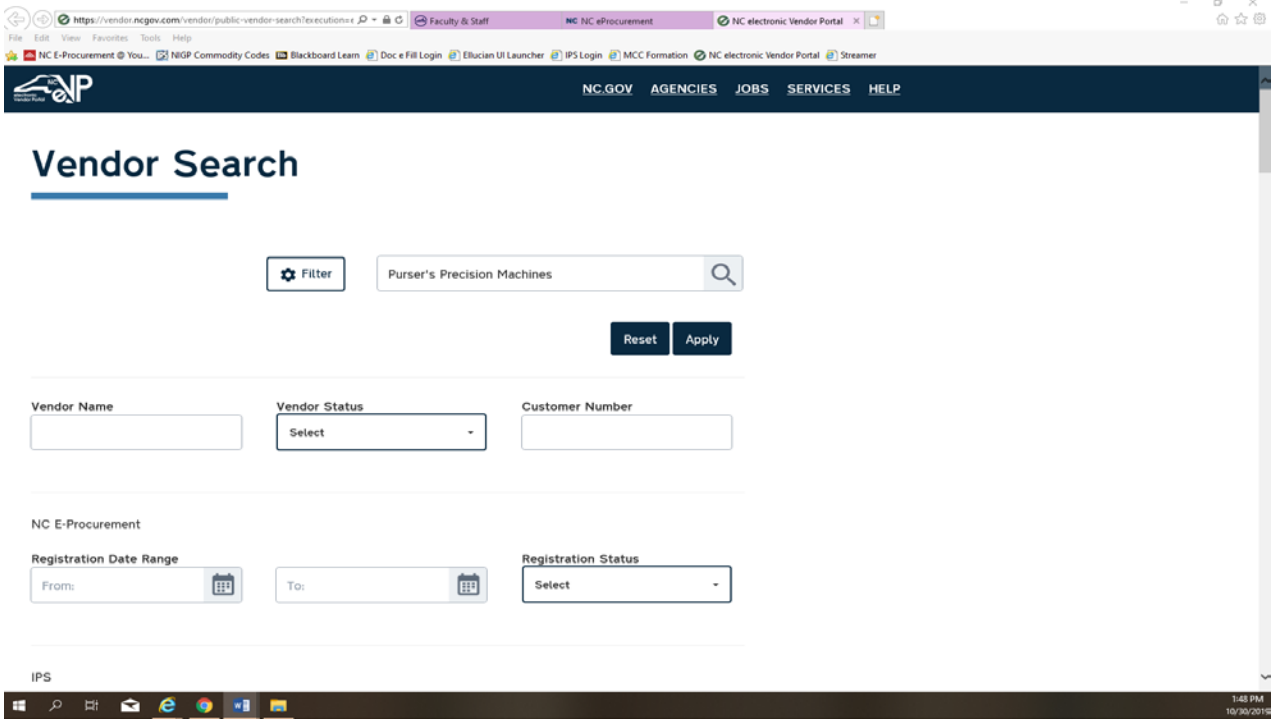
From the MCC webpage, Info For, Faculty & Staff link, click on NC E-Procurement...



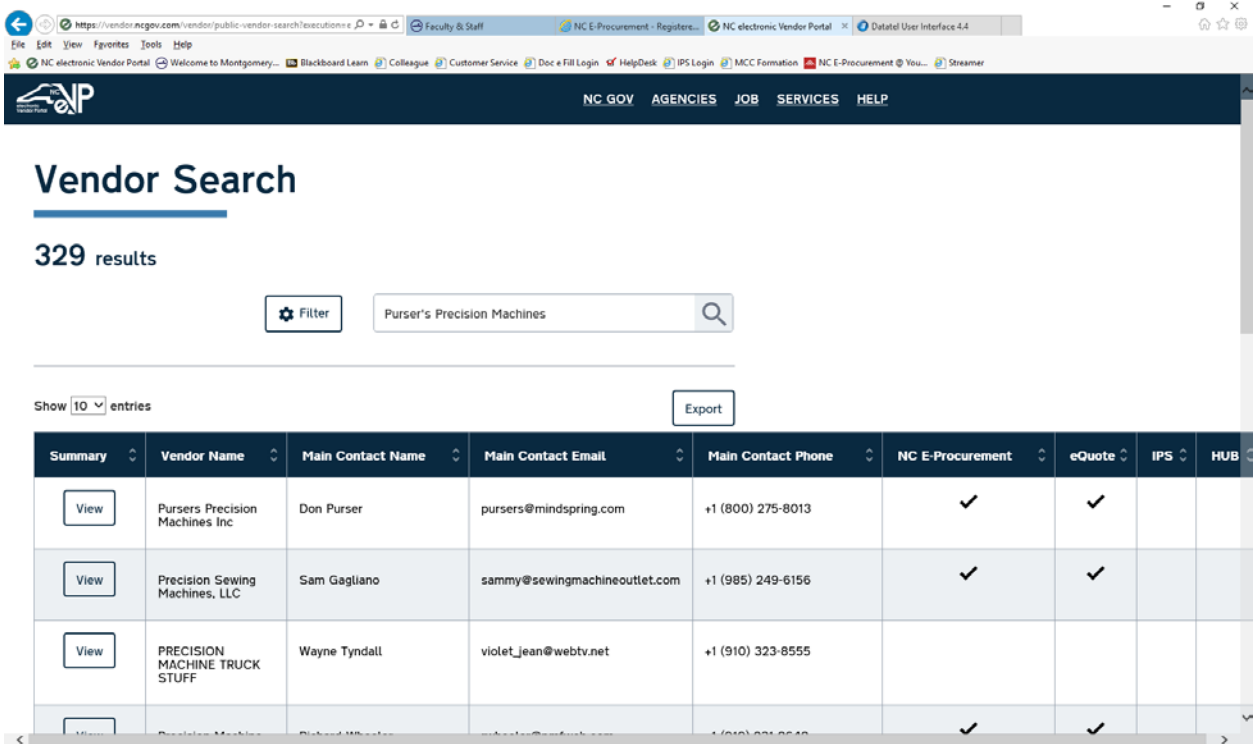
Click Public Vendor Search...



Type in the vendor's name and click the search icon...



Several vendors are displayed...



Click the View Box associated with the vendor name to verify this is the vendor you are searching for...

The screenshot shows a web browser window with the URL <https://vendor.nc.gov.com/vendor/public-vendor-search/execution/e...>. The browser tabs include 'Faculty & Staff', 'NC E-Procurement - Registers...', 'NC electronic Vendor Portal', and 'Datatel User Interface-4.4'. The browser's address bar shows several bookmarks, including 'NC electronic Vendor Portal', 'Welcome to Montgomery...', 'Blackboard Learn', 'Colleague', 'Customer Service', 'Doc e Fill Login', 'HelpDesk', 'IPS Login', 'MCC Formation', 'NC E-Procurement @ You...', and 'Streamer'.

Vendor Status: Active [Return to Search](#) [Print](#) →

Company Information ▾

General Vendor Information ▾

Vendor Name: Pursers Precision Machines Inc	Company Website:
Ariba Network ID: Not Specified	Dun and Bradstreet #: 052683612

Business Characteristics ▲

Contacts ▾

Purser, Don
President - pursers@mindspring.com - +1 (800) 275-8013

Location ▲

eQuote ▲

Terms of Use ▲

APPENDIX C

Links to Purchase & Contract Mandated Forms can only be accessed through the Procurement Information Portal (login required).

Link to Statewide IT Mandated Forms and Templates:

<https://it.nc.gov/it-procurement-forms-and-templates>

<p><u>Invitation for Bids (IFB) Form for IT Goods and Services</u></p>	<p>This template represents the State’s model solicitation document used to procure information technology (IT) goods, embedded software and/or associated services, as applicable. This document may be used as either an IFB or RFQ, as appropriate.</p>
<p><u>Invitation for Bids (IFB) / Request for Quote (RFQ) Form for Software and Software Support</u></p>	<p>This template represents the State’s model solicitation document used to procure software, or software and software support, as applicable. This document may be used as either an IFB or RFQ, as appropriate.</p>
<p><u>Invitation for Bids (IFB) / Request for Quote (RFQ) Form for Software Maintenance (for existing software)</u></p>	<p>This template represents the State’s model solicitation document to be used to procure software maintenance for software that is already licensed to the State. This document may be used as either an IFB or RFQ, as appropriate.</p>
<p><u>Instructions and Optional Terms for the RFP</u></p>	<p>This document provides additional instructions for the RFP below and terms that may be used therein.</p>
<p><u>Request for Proposal (RFP) Form</u></p>	<p>The RFP is a formal, written solicitation document typically used for seeking competition and obtaining offers for more complex services or a combination of goods and services. The RFP is used when the value is over \$10,000. This document contains specifications of the RFP, instructions to bidders and the standard IT Terms and Conditions for Goods and Related</p>

	<p>Services. User should add Supplemental Terms and Conditions for Software and Services, when applicable.</p>
<p>Request for Information (RFI) Form</p>	<p>This document is 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. While information gathered from vendors' responses to the RFI may be used to enhance the agency's future IT 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.</p>