

UNIVERSITY OF NORTH CAROLINA

SCHOOL OF THE ARTS

UNC School of the Arts Purchasing & Contracting Essentials

The Guide to Successful Contracts and Purchasing at
UNCSA

Revised 09/2025

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Introduction

Greetings!

The University of North Carolina School of the Arts' Department of Campus Purchasing Services is responsible for the effective oversight of all aspects of Purchasing, surplus property, insurance and contracting activity related to business transactions. Our focus is to provide responsible resource management, exceptional best-value Purchasing strategies and streamlined Purchasing processes. We want to ensure that contracting and materials management processes protect the University's resources. We recognize that there is not an effective, overall "one size fits all" approach for the services we provide; therefore, we focus on providing our customers with effective solutions that will meet their acquisition, resource and contracting needs.

This guide, **Purchasing and Contracting Essentials**, was created in order to provide our customers with a brief overview of the tools, resources and processes managed by our Campus Purchasing Services professionals.

As you review this guide, feel free to contact me with your suggestions and feedback. Our customers' input is highly valued, and we want to hear from you!

As always – thank you!

Director of Purchasing, Contract
and Auxiliary Services

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Roles and Responsibilities

The members of Campus Purchasing Services and their rolls are listed below for your convenience:

Vacant, Director of Purchasing, Contract, and Auxiliary Services 336-770-3319

valentinej@unca.edu

Areas of Responsibility: Contract Administration, Change Orders/PO Close Outs, State & UNC System Contracts, RFQs, IFBs, RFPs, Third Party Accounts, Vendor Forms, Surplus Property, Insurance, Compliance, and State Reporting

Nita Mobley, Associate Director of Purchasing
336-770-3320

mobleyn@unca.edu

Areas of Responsibility: Day-to-day operations of Purchasing Services, Pcard Administrator, Purchase Orders, Change Orders/PO Close Outs, State & UNC System Contracts, RFQs, IFBs, RFPs, COI Requests

Renee Berry, Purchasing Specialist & Pcard Manager
336-631-1589

berryr@unca.edu

Purchasing Card Management, Change Orders, PO Close Outs, Vendor Registration, Office Supply & Amazon Orders, Purchasing Card Coordinator for Purchasing/Auxiliary Division, Purchasing Card Training

Eli Lowe, Warehouse Manager
336-631-1204

lowee@unca.edu

Responsibilities include: Merchandise Receiving, Merchandise Delivery, Records Pick-Up and Storage, Surplus Property Pick Up and Delivery, Warehouse and Mail Center Operations

Jason Carter, Warehouse Technician/Mail Center
Clerk 336-631-1204

huffk@unca.edu

Responsibilities include: Merchandise Receiving, Merchandise Delivery, Records Pick-Up, Records Storage, Warehouse Operations, Surplus Property Pick-Up and Surplus Property Delivery.

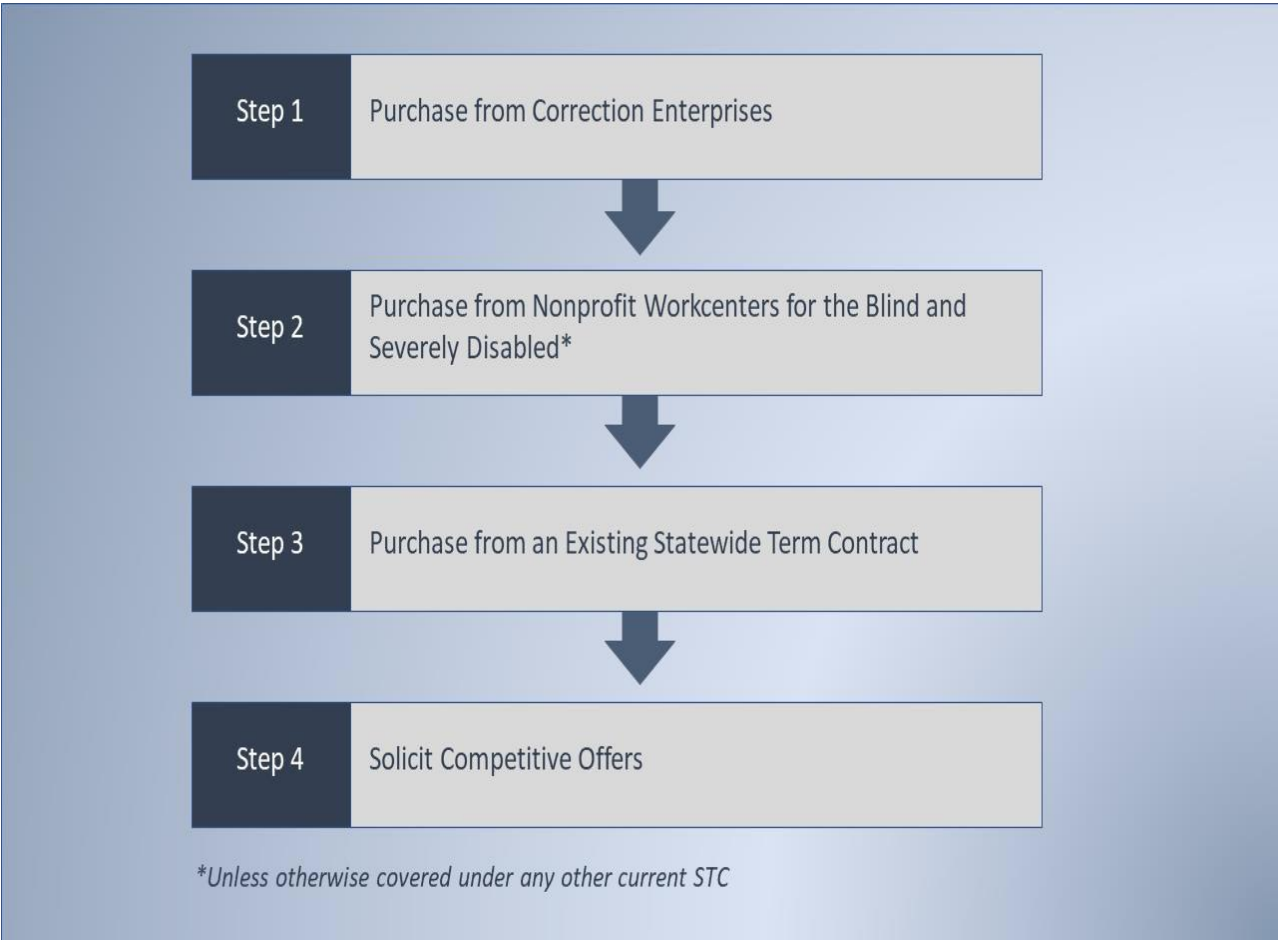
2 Purchasing Authority

Thresholds

The State of North Carolina Department of Purchase & Contract grants the authority to State entities to purchase goods and services within the delegated dollar threshold. Below is a listing of the thresholds for UNC School of the Arts:

<i>Estimated Cost</i>	<i>Purchasing Requirements Goods, Printing and Nonprofessional Services</i>	<i>Estimated Order Lead Time (Business Days)</i>
\$ 31,000 or less Processed IN HOUSE	Individual departments should create a requisition in Pickle Mart. Please attach an official quote from the vendor as supporting documentation.	Up to 48 hours
Exceeding \$31,000 to \$100,000 Processed IN HOUSE	For purchases exceeding \$31,000 but not exceeding \$100,000, please submit three formal quotes to Purchasing for review prior to entering a requisition in Pickle Mart.	Up to 72 hours
Exceeding \$100,000 Formal Purchases	Individual departments will submit a Departmental Bid Form, Detailed specifications in WORD or EXCEL format, A Brand – Specific Waiver (if required). Once all items have been received in the bid inbox, Campus Purchasing Services will process an IFB or Request for Proposal (RFP) for posting.	30-90 Days (Sealed IFB) 30-90 Days (Sealed RFP)

There are several purchasing preferences that should be considered prior to issuing a solicitation.



3 Purchasing Within Our Delegated Authority

\$31,000 and Below

UNCSA Departments have delegated authority to make purchases at or below \$31,000 for goods and services, as they deem necessary. If the total order is under \$31,000, the department may get quotes and process a requisition.

North Carolina State Purchase & Contract executes bids on behalf of the State of North Carolina. These State Term Contracts are for utilization by State agencies. Some of the contracts are mandatory and some are for convenience. You will find an alphabetical listing of these contracts by following the link below:

<https://ncadmin.nc.gov/government-agencies/procurement/statewide-term-contracts>

When making a Purchase from a vendor under the \$31,000 threshold, there are several methods that may be utilized:

- **Purchasing Card** – This is the PREFERRED way to make **purchases at or below \$5000**. The use of P-Card is highly efficient and makes the entire process faster than processing Purchase Orders. Refer to the P-Card User’s Manual for allowable purchases and procedures for utilizing the P-Card.
- **Purchase Order** – A Department can request a Purchase Order by processing a Purchase Requisition in the Banner Financial System. Once the Purchase Order is generated, it will be sent electronically to the Department, who in turn, forwards it to the vendor to finalize the purchase of the good or service. All purchase orders must have a quote forwarded to the Purchasing Inbox for verification and attachment to the PO.

Exceeding \$31,000 to \$100,000

When a department is making a purchase that exceeds \$31,000 to \$100,000 that is **NOT** on State Term Contract, Campus Purchasing Services will handle the Purchasing. The department must submit the following to Campus Purchasing Services to initiate the process:

- Departmental Bid Form
- Detailed specifications in WORD or EXCEL format
- A Brand – Specific Waiver (if required)
- Search results for HUB Vendor

Once all items have been received in the purchasing inbox, Campus Purchasing Services will issue an IFB or RFQ to 3 vendors listed on the departmental bid form for pricing.

Exceeding \$100,000

When a department is making a purchase that is above \$100,000 that is **NOT** on State Term Contract, the department must submit the following to Campus Purchasing Services to initiate the process:

- Departmental Bid Form
- Quote from a vendor for the Items / Service needed
- Detailed specifications in WORD or EXCEL format.
- A Brand – Specific Waiver (if required)

Once all items have been received in the bid inbox, Campus Purchasing Services will process an IFB for posting. For complex services or services where the vendor is required to provide what means they will utilize to provide the service, an RFP will be used.

If the **FUNDING** source is at least **30% State Funds**, Purchasing Services will send a draft of the IFB or RFP to the NC Department of Purchase & Contract for review and approval, prior to posting on the IPS, which is open to all vendors.

The bid is submitted back to Campus Purchasing Services, typically, within 21 to 30 days after being placed on IPS. Once the Purchasing process has started, no department other than Campus Purchasing services can communicate with vendors regarding the solicitation.

The Contract Award will be made to the vendor who provides the “Best Value” to the University, after our award recommendation is approved by the oversight agency.

You are required to seek HUB vendors for all purchases. Promoting and encouraging HUB participation in procurement opportunities is central to the economic growth and stability of the state. Certified HUB vendors can be found <https://ncadmin.nc.gov/businesses/historically-underutilized-businesses-hub> and searched by commodity or by using the NC eProcurement Vendor Search function.

Brand Specific Solicitations

A Brand Specific Request allows a contract to be awarded for a specific brand name supply or service item under certain circumstances.

Circumstances that could necessitate Brand specific Purchasing are listed on the Brand Specific Waiver Request. Brand specific procedures do not apply if the Total Contract Value is \$31,000 or less. Only authorized Campus Purchasing Services' personnel shall make the determination as to whether the Purchasing shall be solicited as Brand Specific. Please note that this does not exempt the purchase from the competitive Purchasing process. A Brand Specific Solicitation, RFQ, IFB or RFP will be issued as required; however, only vendors that can provide the specific brand will be considered for award.

Sole Source Purchases

Sole Source Exemption allows for a contract to be awarded to a vendor when no competition has been sought. Pursuant to North Carolina General Statutes, competition shall be sought whenever practical; however, the University may waive the competitive process and approve Sole Source purchase provided that the requester can adequately justify its need. In cases where an alternate supplier for a similar product or service cannot be identified, the requester must document that a good faith effort has been made in seeking other sources. This is handled by completing and submitting a Sole Source Justification Form, with all required documentation, to Campus Purchasing Services. The request will be reviewed by purchasing personnel and a determination will be made. In some instances, additional research may be conducted by Campus Purchasing Services to see if alternate Purchasing sources can be located. Once the request is approved by Campus Purchasing Services, a requisition can be processed in Banner.

4 Contract Information

Contract Forms

To acquire Commodities or Services, the parties involved should enter into some form of written contract regardless of the dollar value. Written contracts may be in a variety of forms including, but not limited to, Purchase Orders (w/ UNCSA Terms & Conditions), Professional Services Agreement (PSA), Use Agreements and Rental Agreements. Contracts do not need to be labeled as such to be legally binding as interpretation is typically based on the content. There are different types of contracts used to formalize the obligations and expectations of the parties involved.

Oral Contracts

Oral Contracts are not an acceptable form of contract and are **not** binding on the University.

Contracting in Good Faith

UNC School of the Arts contracts in good faith. It is our obligation to ensure that UNCSA contracts are enforceable, legal, fair, and represent terms and conditions under which UNCSA can agree. Some contracts contain terms and conditions that, as a state entity, we cannot agree to. Each contract the University enters into must be reviewed by Campus Purchasing Services and UNCSCO Legal, if required, before getting signed. Contracts must accurately represent the obligations, expectations, and the timeframe in which the contract is valid.

Prohibited Contract Clauses

As a State university, UNCSA is prohibited by law from agreeing to certain contractual terms. Below are the most commonly occurring types of prohibited clauses or provisions. If a proposed contract contains one or more of these prohibited clauses or provisions, the contract will not be approved by Campus Purchasing Services, UNCSCO Legal or the individual authorized to sign the contract.

Acceleration of Payment	Arbitration
Assignment of Rights	Choice of Law / Governing Law
Forum, Venue and Jurisdiction Selection	Indemnification
Limitation of Liability	Liquidated Damages
Material Breach / Irreparable Harm	Statute of Limitations
Non-Compete Clauses	

Contract Officers

Contract Signature Authority is delegated by the Chancellor for signature specific contract types on behalf of the University of North Carolina School of the Arts. Only Contract Officers are authorized to sign and execute contracts and other written instruments on behalf of UNCSA. According to UNCSA Policy #109 – Signature Authority for Contracts, Contract Authority for UNCSA is as follows:

A. Vice Chancellor for Finance and Administration and Executive Vice Chancellor and Provost. All procurement contracts over \$10,000 and below \$50,000; faculty contracts, exchange agreements, intellectual property agreements, and appointment letters; grants and sponsored research agreements; rental and license agreements; and all lease agreements.

B. Vice Chancellor of Advancement. All agreements relating to gifts to the State, bequests to the State, grant proposals relating to scholarships or endowed funds, and letters and other documents regarding personnel matters relating to employees in the Vice Chancellor of Advancement's division.

C. Associate Vice Provost and Dean of Students. Contracts and agreements below \$2,500 for entertainment, professional services, and other activities funded by student fees; contracts relating to services provided by the Student Health Center.

D. Associate Vice Chancellor and Chief Human Resources Officer. Letters and other documents regarding personnel matters.

E. Academic & Arts Deans. Professional Services Agreements (using the standard template agreement) for their respective schools with a total dollar amount of \$500 or less which do not fall into any of the above categories (e.g., an agreement for a purchase of \$500 or less, with no lease aspects, etc.).

F. Director of Purchasing, Contracting, and Auxiliary Services. All procurement related contracts below \$10,000; copier agreements; insurance agreements and renewals.

G. Associate Director of Purchasing. All Purchase Orders, requests and invitations for quotes, proposals and bids.

H. Associate Vice Chancellor of Facilities Management. All design, construction, repair, and renovation contracts.

6 Contract Routing Process

Except as otherwise permitted by policy or procedure, all school Purchasing contracts must be submitted to the purchasinginbox@unca.edu for review and approval prior to obtaining signatures for the contract. The following procedure shall be used:

1. The initiating department will complete the Contract Routing Form and attach a copy to the original contract that requires review and execution.
2. The Contract Routing Form and original contract will be forwarded to the purchasinginbox@unca.edu for initial review. The Director of Purchasing, Contract, and Auxiliary Services will sign the Contract Routing Form and forward as required.
3. If the contract is over \$100,000 the Director of Purchasing, Contract, and Auxiliary Services will forward it to Legal Counsel for review. The Legal Counsel will sign the Contract Routing Form and forward as required.
4. If the contract is for IT related services, the Director of Purchasing, Contract, and Auxiliary Services will forward it to the Chief Technology Officer for review. The Chief Technology Officer will sign the Contract Routing Form and forward as required.
5. All contracts will be routed through Budget and reviewed for fund availability, The Director of Budget will sign the Contract Routing Form and forward as required.
6. Once all reviews have been completed, the Director of Purchasing, Contract, and Auxiliary Services will execute the contract (if under \$10,000) or will forward to the appropriate individual for execution.
7. Once executed, the contract will be returned to the initiating department.

7 Direct Pay Requests

Direct Pay Requests are used **only** for:

- Registration fees
- Membership fees
- Bank Fees
- Postage Fees
- Student Emergency Checks
- Refunds for Deposits
- Legal Fees/Audit Fees
- Insurance
- Any other instance where pre-payment is required
- UNCSA PSA – personal services provided by a **professional individual (person)** on a temporary or occasional basis. Including (by way of illustration, not limitation) those provided by a doctor, dentist, attorney, architect, professional engineer, scientist or performer of the fine arts and similar professions. The exemption applies only if the individual is using his/her professional skills to perform a professional task. A personal service may also be a consulting service.

Appendix I: Frequently Asked Questions

Q1 - How can I check on the status of a project that I have submitted to Campus Purchasing Services for bid out?

A1 - Submit an inquiry to bids@uncsa.edu. We will review the project and let you know the status.

Q2 - Can a department sign contracts of little or no cost (such as hotel agreements or rental contracts)?

A2 - If the contract requires a binding signature, it must be submitted to the purchasinginbox@uncsa.edu for review and approval prior to obtaining signatures for the contract. (Please see “Contract Signing Authority” on page 10)

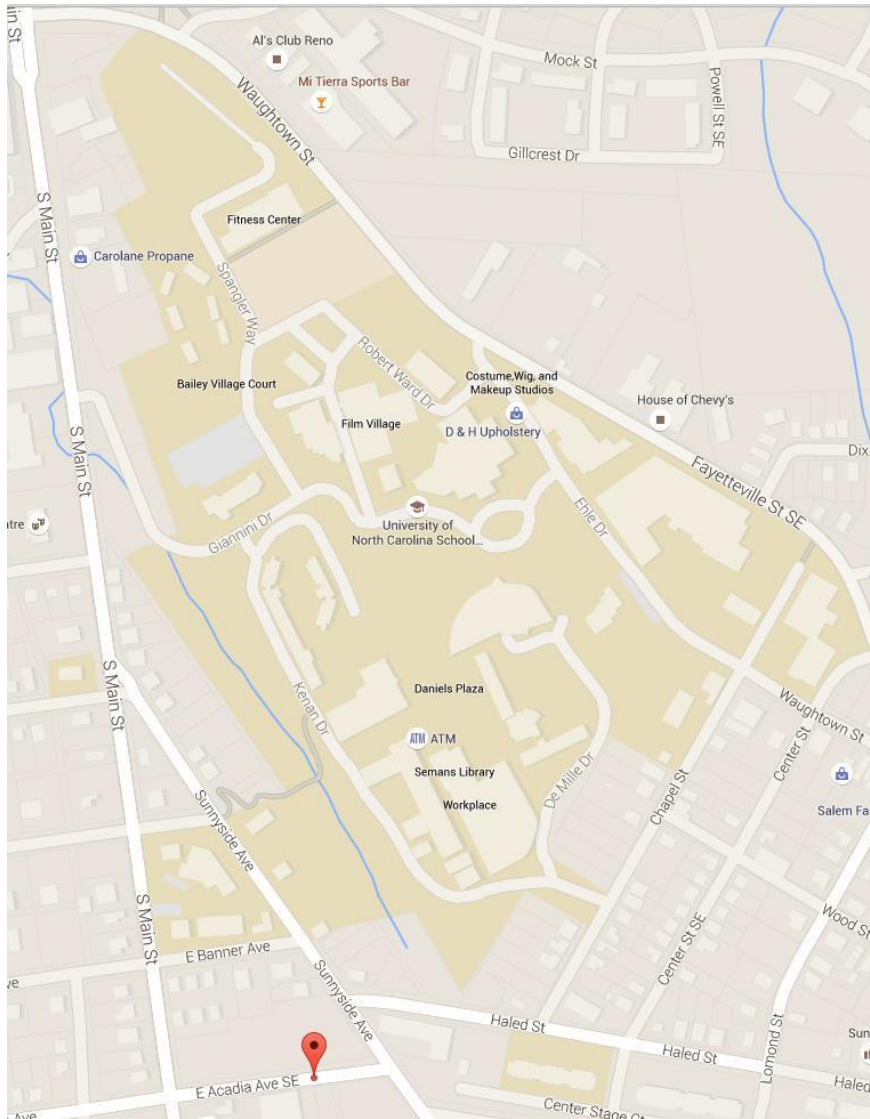
Q3 - How do I request a Certificate of Insurance (COI) if a vendor requests one?

A3 – The COI request form is located on the Purchasing Website under “Forms”. Submittal instructions are located at the top of the form.

Q4 - A vendor has requested our W-9 form. How do I get a copy?

A4 - The W-9 form is located on the Purchasing Website under “Forms”.

Where We Are Located and How to Submit to Us



To submit CONTRACT ROUTING FORMS: purchasinginbox@unca.edu

To submit DEPARTMENTAL BID FORMS: bids@unca.edu

To submit SURPLUS REQUESTS: surplus@unca.edu

To submit REQUISITION DOCUMENTS: purchasinginbox@unca.edu

To submit SOLE SOURCE DOCUMENTATION: bids@unca.edu

To submit BRAND SPECIFIC WAIVERS: bids@unca.edu