



Procurement Overview Guide

Who, What & for How Much?

Union County procurement division provides centralized procurement services to all County departments. We follow applicable North Carolina General Statutes and Union County Procurement Policy when purchasing goods (apparatus, supplies, materials and equipment), construction or repair services and other services based on the dollar amount of the purchase. This brief [doing business overview guide](#) will identify the amount of spend for each purchasing level.

Union County's procurement practices are based on the principle of open competition and transparency in support of the dual goals of securing value and promoting fairness.

Purchase of Goods (apparatus, supplies, materials and equipment)

\$0 – Less than \$5,000

Departments may purchase up to \$4,999 by securing at least one quote. If administratively feasible, competition to secure more quotes may occur.

\$5,000 – Less Than \$30,000

Departments secure three quotes for purchases over \$5,000 up to the informal limit of \$30,000. Departments or a procurement representative may, call, email or fax a request for quotes. The departments will identify the item, the quantity they need and any special delivery instructions in the rest of the quote document. Make sure you understand exactly what the department is looking for. As you prepare your quotation, be sure to figure in all your cost, freight to your location, and handling by your employees, freight from your location to where the department expects delivery and any special equipment needed to make the delivery. Your quote should be written clearly so there can be no misunderstanding. Check your figures before submitting the quote. If a Purchase Order (a form of purchasing contract) is issued based on a quotation, the PO becomes a legally binding contract.

INFORMAL BIDS \$30,000 – Less than \$90,000

When the dollar spend reaches \$30,000 for purchases, certain State of NC requirements kick in. The \$30,000 dollar threshold starts the Informal Bid process. The informal bid process may require sealed bids in the form of an Invitation for Bid (IFB), depending on what the department is buying.

The IFB is used when the department knows exactly what they need, i.e., a new truck or 6 cubic yards of cement. The IFB will list the material or item required, the quantity needed and any special delivery instructions, much like a request for quote. The IFB will be a sealed bid, meaning you will need to seal the quote or bid in an envelope before submitting/mailling it. There will be special instructions on how to submit your bid and a date and time it must be turned in by to be eligible to be opened. **Make sure you follow all instructions – failure to do so will result in your bid being rejected.**

FORMAL BIDS \$90,000 and Over

The formal bid process to purchase goods is the same as the informal process *except* for the advertising requirements.

Advertisement and Registration Information

Formal bids and Informal bids (if applicable) are published on the County web site under the Procurement Division at www.unioncountync.us and on the NC State Procurement we site at www.ips.state.nc.us/ips. Formal bids are advertised in accordance with applicable NC laws and County policy.

Vendors/Contractors may register at both sites. The County uses the registration to identify available vendors. The state site will send you an email notification when a bid opportunity becomes available.

Construction or Repair Services

Union County is required to follow various guidelines for the purchase of Construction or Repair Services, Building Construction or Repair Services and more.

The information listed below is an overview of dollar thresholds used for Construction or Repair Services.

<p align="center">\$0.00 – Less Than \$9,999</p> <p>Departments may secure one quote at this level and document accordingly. Departments work with procurement to prepare the contract document.</p>	<p align="center">\$10,000 – Less Than \$30,000</p> <p>Departments may secure three quotes at this level and document accordingly. Departments work with procurement to prepare the contract document.</p>
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<p align="center"><u>Informal Bidding</u></p> <p align="center">-Construction or Repair Services -Building Construction or Repair \$30,000 to \$500,000*</p>	<p align="center"><u>Formal Bidding</u></p> <p align="center">-Construction or Repair Services -*Building Construction or Repair \$500,000 and Above</p>
<ul style="list-style-type: none"> ➤ Potential bidders are notified of bid opportunities by posting on the Union County and/or State of NC web sites (if applicable). Bidders list may be used to contact potential bidders. ➤ Bidders submit sealed bids on the specified due date, time and location listed in bid document. Late bids are not accepted. ➤ Public bid opening may occur (if applicable). Not required. ➤ Pre-bid only occurs if stated in bid documents. ➤ Award is made to the lowest, responsive and responsible bidder. ➤ Refer to N.C.G.S. 143-129 and 143-131 (see other applicable statutes) <p><i>*Note:</i> Per State of NC law, formal bidding requirements apply to certain construction or repair contracts valued at <u>\$300,000</u> and above items. Refer to NC HUB guidelines for details.</p>	<ul style="list-style-type: none"> ➤ Potential bidders are notified of bid opportunities by advertising in newspaper and/or posting on the Union County and/or State of NC web sites (if applicable). Bidders list may be used to contact potential bidders. ➤ Bidders submit sealed bids on the specified due date, time and location listed in bid document. Late bids are not accepted. ➤ Public bid opening occurs. ➤ Pre-bid only occurs if stated in bid document. ➤ Award is made to the lowest, responsive and responsible bidder. ➤ Minimum of three bids required. ➤ Refer to N.C.G.S. 143-129 and 143-132 (see other applicable statutes) <p><i>*Note:</i> Minority HUB requirements apply.</p>

Other Services

The Request for Proposal (RFP) is used to solicit proposals to purchase "Other Services" (i.e., non-a/e/s consulting, technology, etc....). RFP's \$30,000 and above are submitted in a sealed envelope on the date, time and location specified in the RFP document. In the RFP, we explain what we need, but the specifications may not be provided. When you submit an RFP, you describe how or what you are suggesting Union County buy from you and tell us why you think your proposed solution is the best solution to solve the specified problem. The RFP ask firms to provide various information specific to the project (i.e., experience of firm, background of assigned staff, price, etc....) including price. Evaluation criteria is used to select the best solution. Price is not the primary selection factor.

\$0.00 – Less Than \$9,999

Departments may secure one quote at this level and document accordingly. Departments work with procurement to prepare the contract document.

\$10,000 – Less Than \$30,000

➤ Departments may secure three quotes or work with procurement to issue an RFP and document accordingly. Departments work with procurement to prepare the contract document.

\$30,000 and Above

- Potential offerors are notified of RFP opportunities by advertising/ posting on the Union County and/or State of NC web sites (if applicable). Bidders list may be used.
- Bidders submit sealed proposals on the specified due date, time and location listed in RFP document. Late proposals are not accepted.
- No public bid opening.
- Pre-bid only occurs if stated in RFP document.
- An evaluation team reviews responsive proposals in accordance with evaluation criteria listed in the RFP and prepares a recommendation to award in accordance with County guidelines.
- Award is based on the best value.

Architectural, Engineering and Surveying Services (A/E/S)

The Request for Qualifications (RFQ) process is used to solicit services from A/E/S firms in accordance with N.C.G.S. 143-64.31. For additional information regarding the RFQ process, contact a procurement representative.

Procurement Team Contact Information

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