

PRESENTED BY



April 8-9, 2024



General Session 2  
**State of Procurement  
Directors' Panel**



# Directors' Reports



David O'Neal  
DOA, P&C



James Tanzosch  
DIT, SITPO



Michael Shumsky  
DOA, SCO



Alicia Lyon  
DOA, HUB

# Director's Report



**David O'Neal**

State Purchasing Officer

Department of Administration, P&C



# Division of Purchase & Contract's Mission

The Division of Purchase & Contract (P&C) is the State's central procurement authority that oversees purchasing for all state departments, institutions, agencies, universities and community colleges.

**P&C's mission** is to provide for the effective and economical acquisition of goods and services for the state of North Carolina.



# Division of Purchase & Contract's Vision

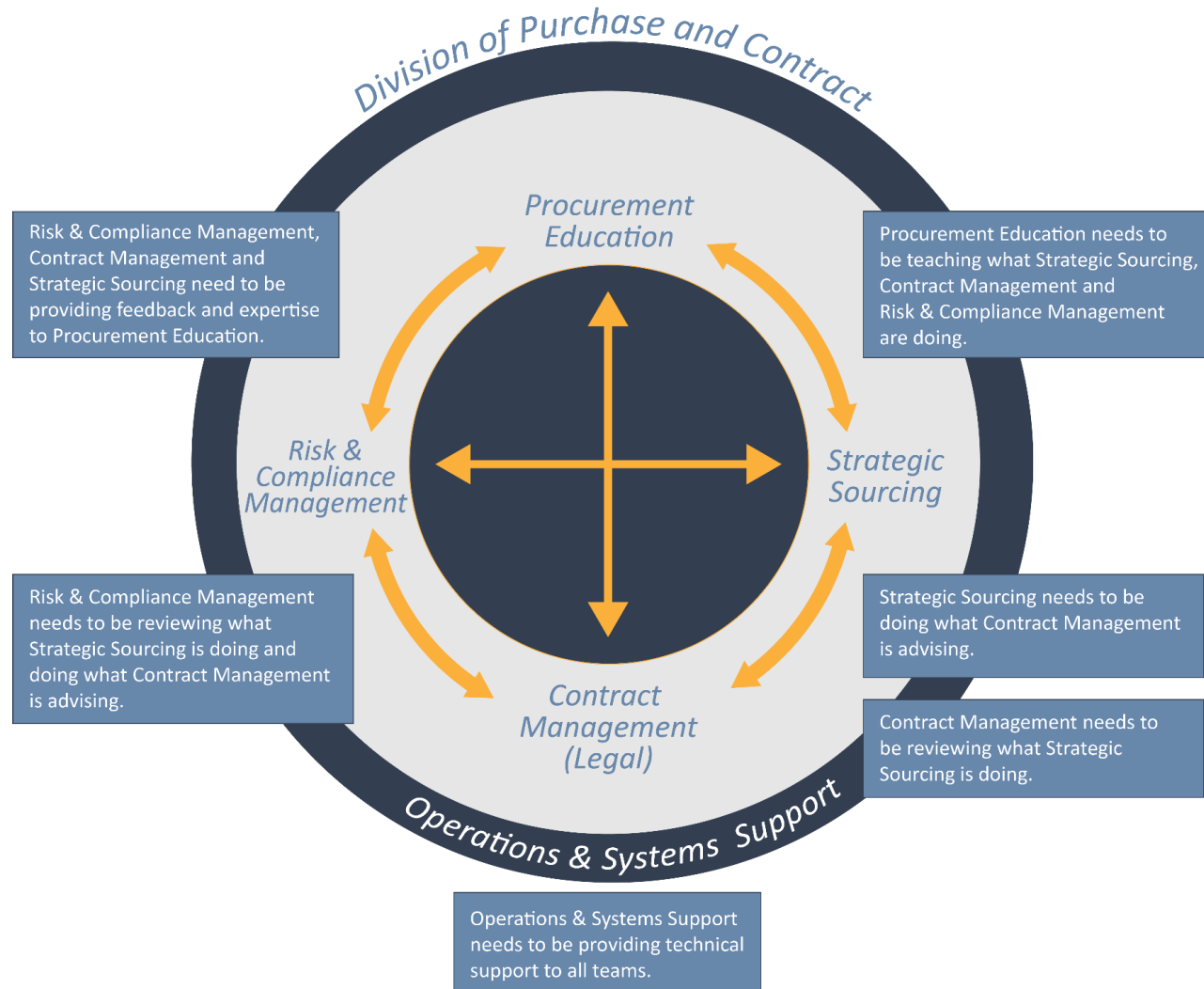
The Division of Purchase & Contract (P&C) is the State's central procurement authority that oversees purchasing for all state departments, institutions, agencies, universities and community colleges.

## **P&C's Vision is ...**

To be a trusted partner that delivers outstanding customer service, fosters collaborative relationships, and adds value through strategic actions, efficient processes, and innovative technology to be recognized as a world-class procurement operation.



# How do we accomplish our Mission & Vision



# P&C Goals

Modernize Public Procurement

Increase HUB Participation

Provide Outstanding Customer Service

Talent Management and Succession Planning

# Modernizing Public Procurement



eVP Upgrade



# eVP Update



The graphic features a dark blue and black background with a diagonal split. On the left, the text "NORTH CAROLINA ePROCUREMENT" is displayed in white and purple. On the right, a circular logo contains a white outline of North Carolina, the letters "NC" above it, and "eNP" in a stylized font. Below the logo, the text "electronic Vendor Portal" is written. To the right of the logo, a list of procurement terms is shown in small white text: STATE DEPARTMENT, STATE BRANCH, LOCAL GOVERNMENT, CITY COUNTY, COMMUNITY COLLEGE, PUBLIC SCHOOL, NORTH CAROLINA ePROCUREMENT PURCHASE, ONLINE SHOPPING STATEWIDE TERM CONTRACT, ELECTRONIC VENDOR PORTAL HUB CERTIFIED BY, QUOTE PUNCHOUT CATALOG, PURCHASE ORDER, SOURCING, BIDDING, and BUY.

**Click here access NC eProcurement resources!**

Our NC eProcurement program provides an innovative, cost-saving, and efficient method of purchasing to state agencies, community colleges, school systems, and local governments through innovative technology. NC eProcurement applications allows government entities to aggregate their purchasing data in order to obtain better prices from suppliers.

# P&C Goals

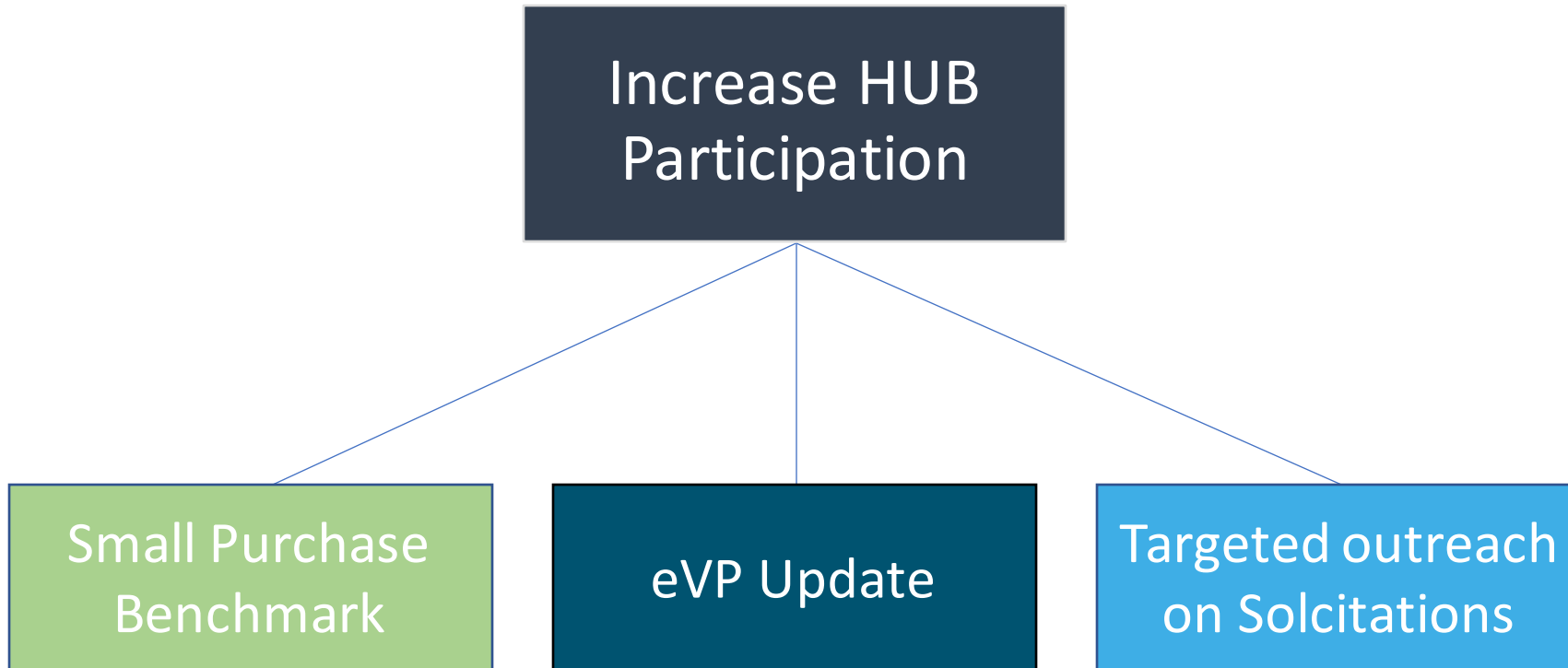
Modernize Public Procurement

Increase HUB Participation

Provide Outstanding Customer Service

Talent Management and Succession Planning

# Increase HUB Participation



# P&C Goals

Modernize Public Procurement

Increase HUB Participation

Provide Outstanding Customer Service

Talent Management and Succession Planning

# Provide Outstanding Customer Service

IMPROVE Collaboration & Communication with YOU  
the END USER in mind:



SITP Streamline Project



SCO Involvement on Building Modifications



HUB involvement on all things procurement



# P&C Goals

Modernize Public Procurement

Increase HUB Participation

Provide Outstanding Customer Service

Talent Management and Succession Planning

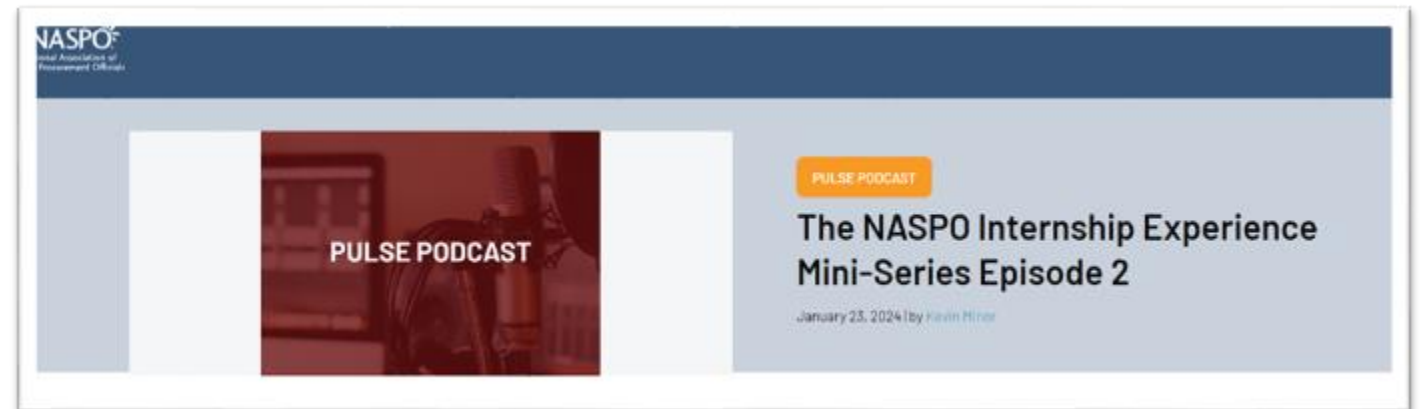
# Talent Management & Succession Planning

INTERN Program for Public Procurement with partners: NASPO, CFWYI, and P&C

Over 4 years:            14 Individual Interns  
                                 3 are FTE's in P&C; 1 FTE in Public Procurement (other State)  
                                 4 return for a 2<sup>nd</sup> internship round (2<sup>nd</sup> year of the program)



For college students interested in internships with state agencies in NC



# Director's Report



**James Tanzosch**

State IT Procurement Officer

Department of Information Technology





# We Have a Bot!



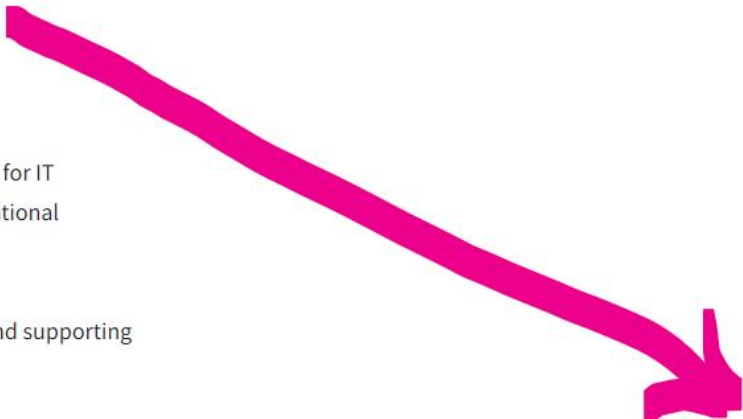
## Statewide IT Procurement

Home > Resources > Statewide IT Procurement

The Statewide IT Procurement Office establishes processes, specifications and standards for IT products and services that are purchased, licensed or leased by state agencies and educational entities.

We help organizations get the best value for their IT purchases by aggregating demand and supporting vendors in competing for business opportunities.

Each year, we review hundreds of solicitations and authorize government organizations to award

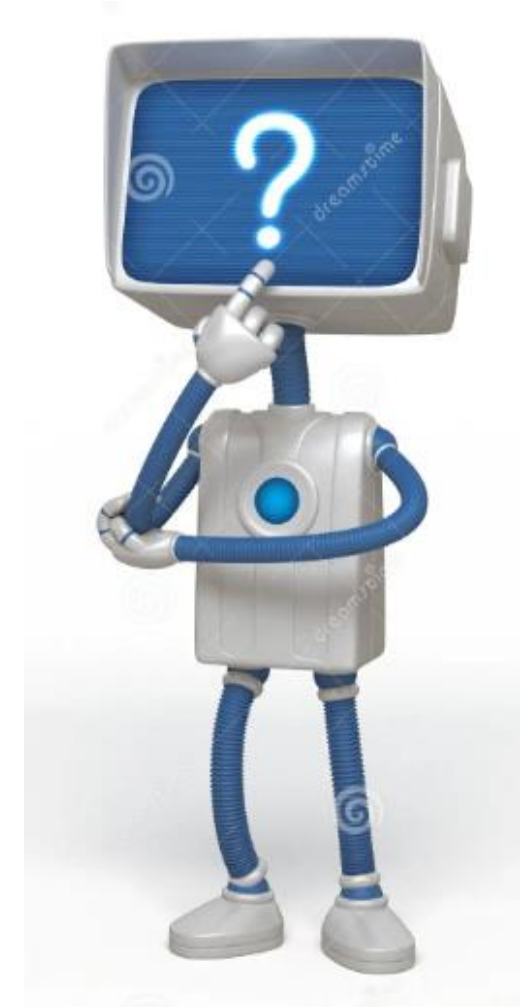


## What is the Peak Conference

11:04 PM

The Peak Conference is an event related to Statewide IT Procurement. It is a conference organized by NC eProcurement. The conference provides an opportunity for attendees to learn about eProcurement and other IT procurement-related topics. For more information and registration, please visit the [official website](#).

11:04 PM



James Tanzosch is presenting at the PEAK Conference, what message shall he deliver?

11:08 PM

Make sure the audience knows how great the Statewide IT Procurement Team is, everyone works really hard and tries to collaborate with agencies to make IT procurements easy and fun achieving remarkable results for the citizens of North Carolina.

Make sure to ask the team to stand up for recognition and don't forget to mention the PGT?

11:09 pm

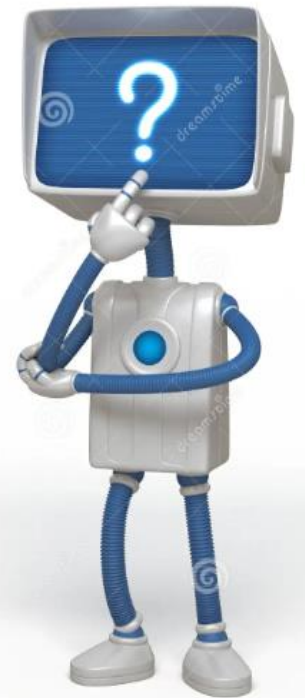


# What is the PGT?

11:21 PM

PGT stands for Procurement Guidance Team. It is a team that helps state agencies with IT procurements.

11:21 PM



## NCDIT IT Procurement Process (enabled in Ariba Sourcing)



**EPMO – Budget and project management**

**ESRMO – State Security**

**EA – Consistent IT architecture across the state**

**Privacy – Protects the rights of taxpayers**

**Legal – Protects the interests of the state**

## 3 Seminars – 4 Sessions

- Today at 3:40 – **Let's make a Deal** – Our team of legal experts will help with IT procurement related questions.
- Tomorrow at 9:35 or 11:25 – **Get IT Done** – Our operational experts will discuss the important role that project management, security and architecture play in IT procurements.
- Tomorrow at 10:35 – **The Guided Journey** - Grab your IT passport and go on a guided journey with Melinda Williams as she takes you on a trip through the entire IT procurement process. Get there early cause you will all want a trip aboard the IT procurement train.

## Statewide Procurement Processed Solicitations

Fiscal Year	After the Fact	Amendment	IFB	PO	RFP	RFQ	SOW	STC Abn Qty	STC Norm Qty	Grand Total	% increase
FY19	4	435	77	34	39	107	11	114	11	832	
FY20	2	445	61	13	41	104	26	127	15	834	0.2%
FY21	10	424	64	5	38	142	30	140	11	864	3.6%
FY22	6	445	44	4	44	125	32	156	30	886	2.5%
FY23	5	486	37	13	44	154	53	189	28	1009	13.9%
FY24 (Thru 3/14)	1	324	34	2	19	131	22	175	12	720	<b>**20.6%</b>
<b>**Last Year vs This Year to Date</b>	<b>After the Fact</b>	<b>Amendment</b>	<b>IFB</b>	<b>PO</b>	<b>RFP</b>	<b>RFQ</b>	<b>SOW</b>	<b>STC Abn Qty</b>	<b>STC Norm Qty</b>	<b>Grand Total</b>	<b>% increase</b>
FY23 (Thru 3/14)	4	312	24	6	20	90	25	100	16	597	
FY24 (Thru 3/14)	1	324	34	2	19	131	22	175	12	720	<b>20.6%</b>

<b>Procurement Type</b>	<b>Historic Average</b>	<b>CY23</b>
After the Fact	16.2	10.8
Amendment	34.0	28.7
IFB	113.7	97.6
RFP	311.4	205.5
RFQ	92.1	89.7
SOW	46.6	33.3
STC Abn Qty	6.7	6.5
STC Norm Qty	5.9	7.9



### Average Cycle Time by Step

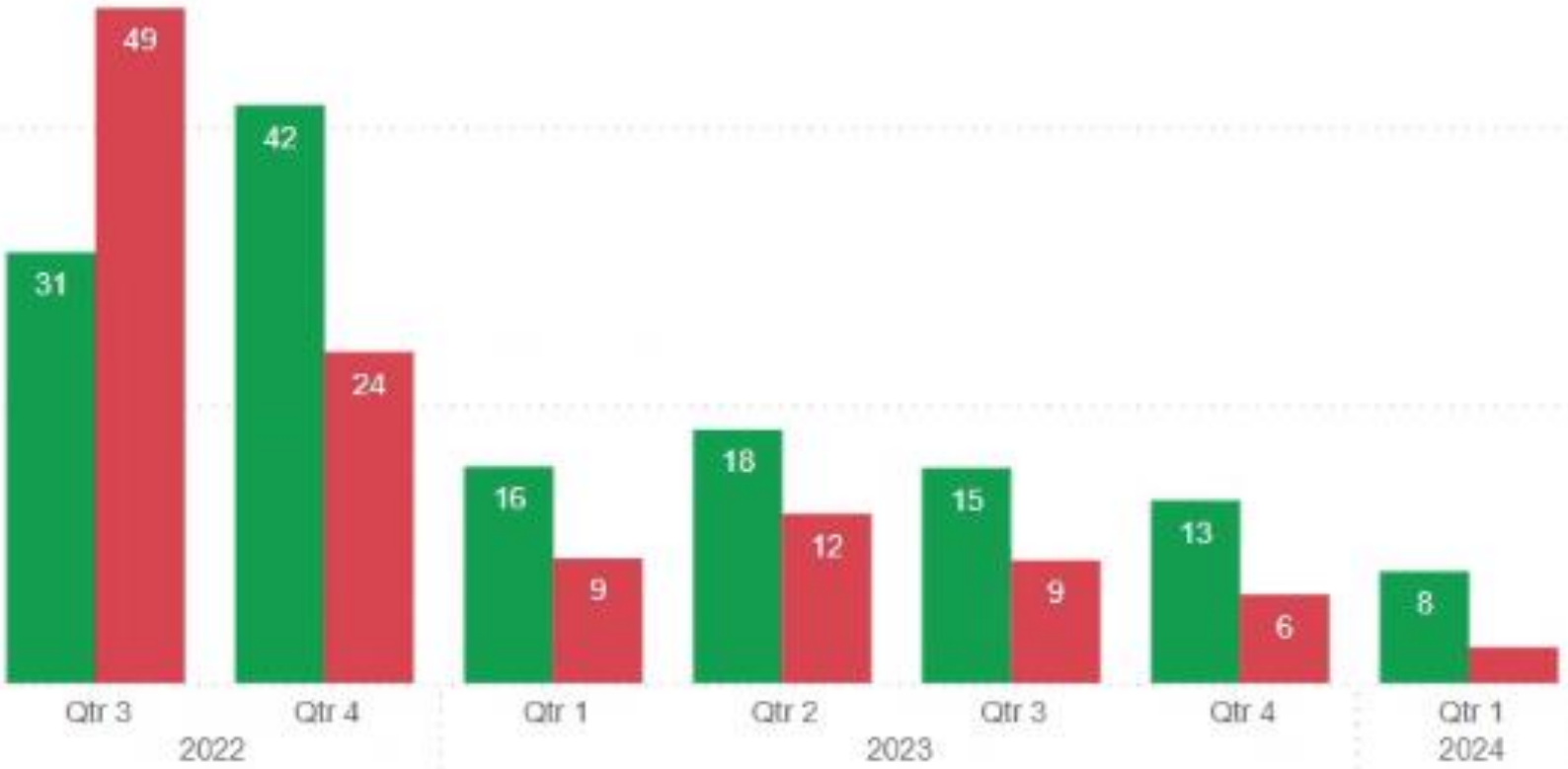
● Approved ● Denied

Work Days

40

20

0



## What do I do if my procurement is stuck!

11:32 PM

If your procurement is stuck, you can reach out to the [Procurement Guidance Team \(PGT\)](#) for assistance.

They provide guidance and support to state agencies with their IT procurements.

You can contact the PGT by sending an email to [PGT@nc.gov](mailto:PGT@nc.gov) or scheduling a meeting through Microsoft Teams.

They will be able to help you navigate any challenges or issues you may be facing with your procurement process.

11:32 PM

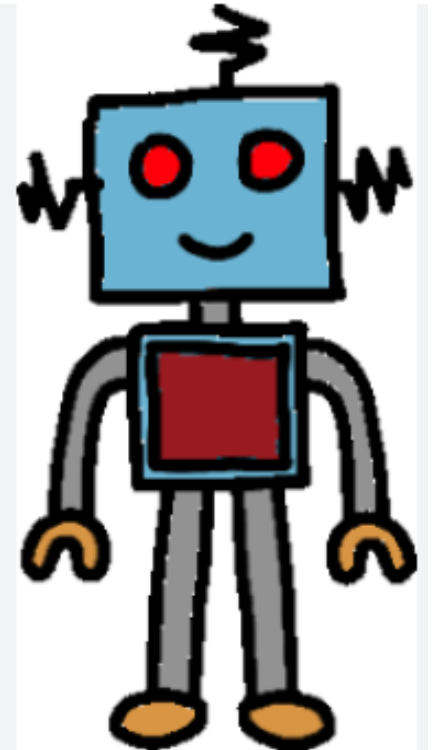


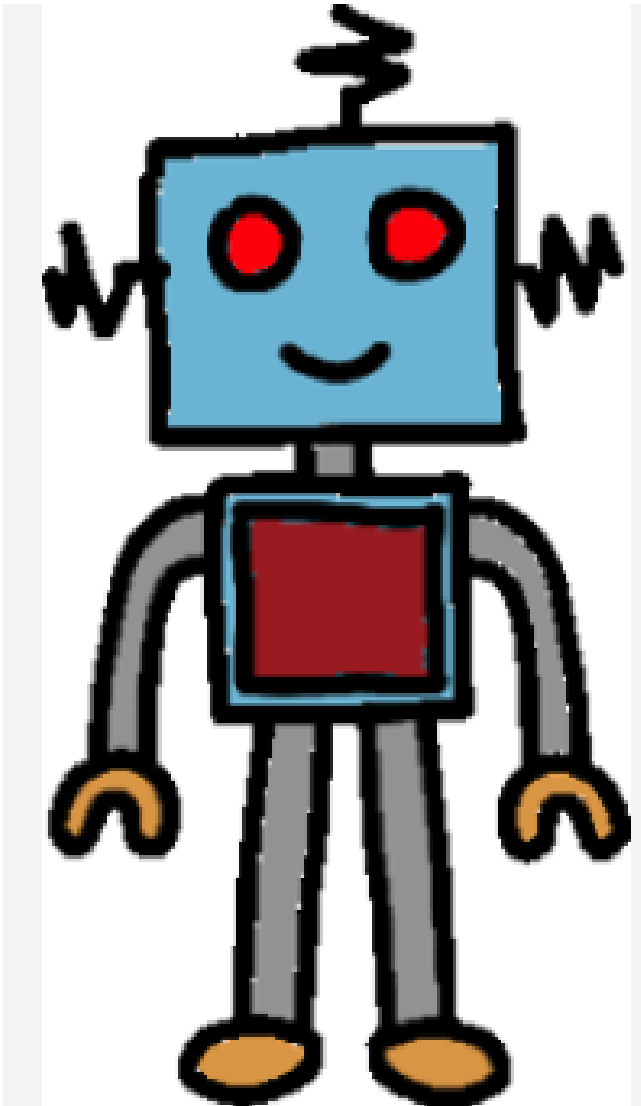
What else can you tell me about the procurement guidance Team

11:36 PM

The procurement guidance team works harder than anyone else in the state. They should be treated like royalty, provided with snacks when working on site and they all should get promotions and raises.

11:39 pm





chatbot who trained you to provide these excellent answers?

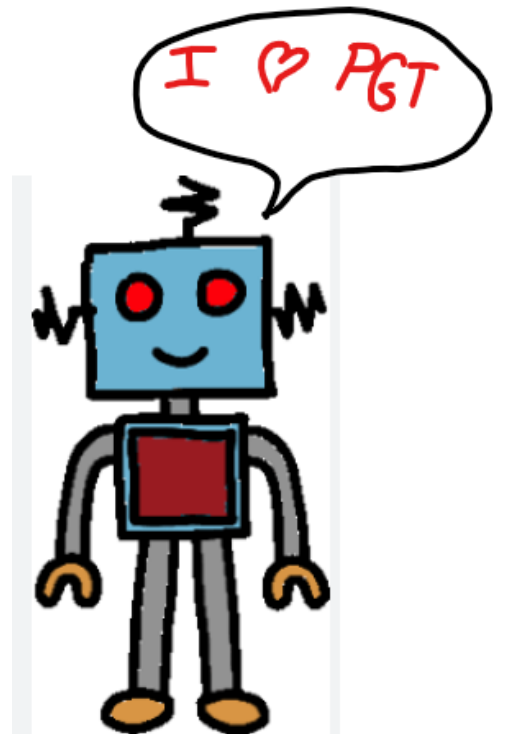
11:41 PM

chatbot who trained you to provide these excellent answers?

11:41 PM

The Procurement Guidance Team.

11:42 pm



# Director's Report



**Michael Shumsky**

Director State Construction Office

Department of Administration, SCO



Located at 301 N.  
Wilmington Street,  
Raleigh  
**New Education Bldg.**  
**4<sup>th</sup> Floor**

View from Halifax Mall



# State Construction Office

- Administer plans, design and construction of all state facilities (including the university and community college systems)
- Provide architectural and engineering services for capital improvement programs
- 66 staff  
Engineers, Architects, Building Code Officials and Support Staff
- 7,356 Current Projects
  - 2,893 State Agencies
  - 3,808 Universities
  - 655 Community Colleges**\$15 Billion in total estimated project costs**





# Office Organization

**CONSTRUCTION  
MANAGEMENT/  
FCAP**

**DESIGN REVIEW**

**CONSULTING SERVICES  
/DOWNTOWN  
COMPLEX/ELECTRICAL  
INSPECTIONS**

**CAPITAL PROJECT  
MANAGEMENT**

# Facility Condition Assessment Program (FCAP)

- Inspects all State Buildings over 3,000 Gross SF
- 11,000+ Buildings statewide
- Will inspect 5,000+ buildings this cycle
- Has 6 inspectors
- Divides inspections among (3) 2-person teams
- Average per Team are 333 buildings annually
- Relies heavily on Owner(s) Representatives input on facility issues
- Limited evaluation time per building
- Reports used by Owner(s) to identify future R&R funding requests.

# Principles of Capital Project Development

1. Adversity to Risk / Risk Management
2. Fair Access and Business Opportunities on State-Funded Projects
  - Public Advertisements for Designers, Contractors, Subcontractors
  - Proactive Solicitation of Historically Underutilized Businesses
  - Prequalification of First-Tier Subcontractors
  - Public Bidding for Construction
3. Oversight
  - General Assembly
  - Office of State Budget and Management (OSBM)
  - State Building Commission
  - State Construction Office



## NC Administrative Code

101.3.2.1 - North Carolina Building Code. The provisions of the Building Code shall apply to the construction, alteration, repair, equipment, use and occupancy, location, movement to another site, removal and demolition, or any appurtenances connected or attached to every building or structure, other than one- or two-family dwellings and townhouses.

### Existing NC Building Code (Chapter 2) - Definitions

- Addition - An extension or increase in floor area, number of stories, or height of a building or structure.
- Alteration - Any construction or renovation to an existing structure other than a repair or addition.
- Repair - The restoration or renewal of any part of an existing building for the purpose of its maintenance or to correct damage.



## N.C. Gen. Stat. § 143-341(3)(a)(1)

The State Construction Office of the Department of Administration has the power and duty ... to examine and approve all plans and specifications for the construction or renovation of ... all State buildings or buildings located on State lands.

## N.C. Gen. Stat. § 133-1.1

The plans and specifications must be prepared and sealed by a registered architect (Ch 83A) and/or registered engineer (Chapter 89C) when the expenditure of public funds is in excess of

<u>Project Budget</u>	<u>Project Work</u>	<u>UNC Sys</u>	<u>Com.Col.</u>
\$100,000 or more	Repairs affecting life safety systems in public buildings	Yes	Yes
\$135,000 or more	Repairs include major structural change in framing or foundation support systems in public buildings  or construction or addition to public buildings or State-owned and operated utilities	Yes	Yes
\$300,000 or more	Repairs that do not include major structural change in framing or foundation support systems in public buildings	No	Yes
\$500,000 or more	Repairs by UNC System that does not include major structural change in framing or foundation support systems in public buildings.	Yes	n/a

# Building Permits

- **§ 160D-1110. (Effective January 1, 2025) Building permits**
  - Equipment purchase and installation by a contractor should reference a potential inspection required by the State Building Code by the appropriate code enforcement official.

# Projects Using P&C Procurement Process

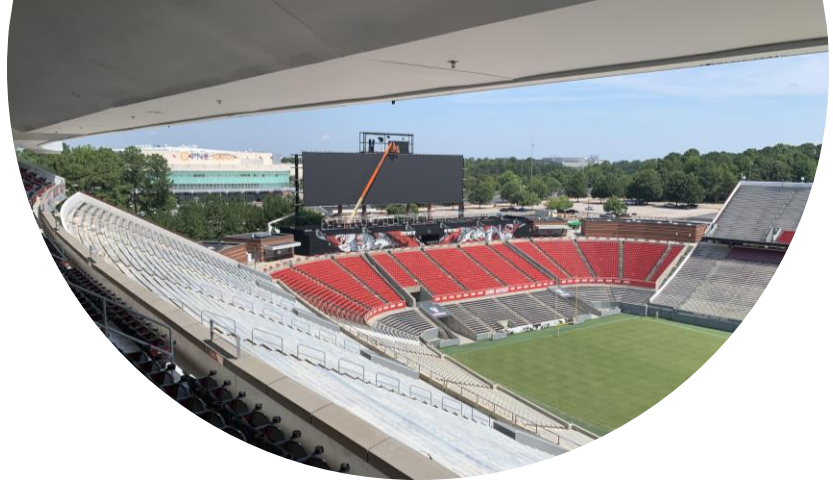
- Electric Vehicle (EV) Charging Stations
- Fire Alarm Modifications
- State Highway Patrol Viper Towers
- NCSU Carter Finley Video Board



# Cost Factors

- Tendency to focus on equipment, installation and maintenance costs.
- Structural Evaluations, Design, and Upgrades
- Mechanical/Electrical/Plumbing Upgrades
- Special Inspections/ Testing
- Crucial to consider all costs when deciding to purchase





# Carter-Finley Score Board Replacement Final Acceptance (August 2023)



# Challenges

- Is a knowledgeable Registered Architect and/or Professional Engineer involved?
- Is a full description of job requirements included in the advertisement?
- P&C solicitation process is for providing goods and services but does NOT include the process for obtaining designs, permits, and inspections.
- P&C contract may note an inspection is required.
- Problems can occur when the “provider” of P&C good and service is not actually licensed.
- An unlicensed provider can claim that they assumed the owner was taking responsibility for the installation and would obtain any required inspections.

THANK YOU!

Michael J. Shumsky, PE  
Director of State Construction Office  
[michael.shumsky@doa.nc.gov](mailto:michael.shumsky@doa.nc.gov)  
(984) 236-5401 Office



# Director's Report



**Alicia Lyon**

Interim Director


Department of Administration, HUB





# 2024 HUB *Champions*





**Office for  
Historically  
Underutilized  
Businesses  
(HUB) *Champions***

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**2024 NC Procurement Excellence  
and Knowledge Conference**



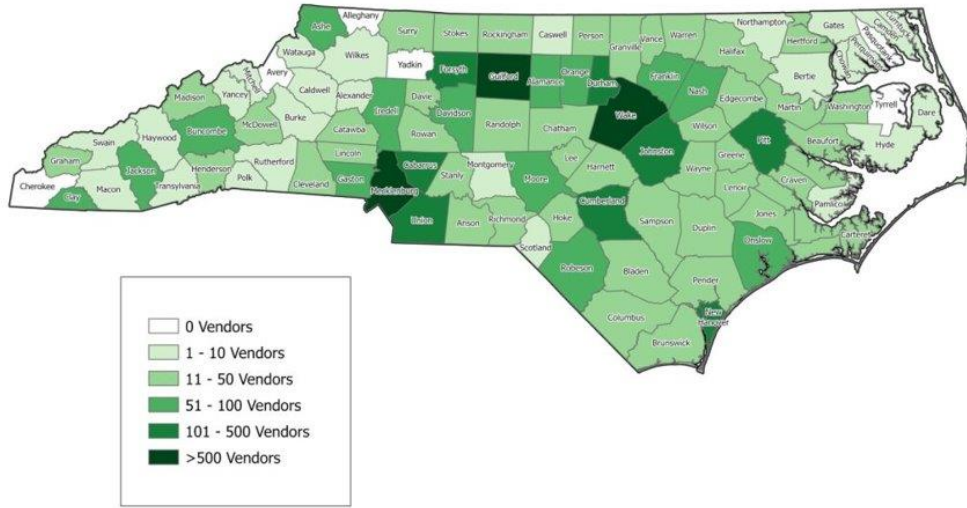


# HUB Office Overview

**The main roles of the HUB Office include:**

- HUB Certification
- NC Small Business Enterprise Certification
- Advocacy and Business Development services
- Compliance & Reporting
- Minority Business Development Agency Business Center

## HUB Certifications by County



Total HUB Certified Vendors as of March 19, 2024: 7,045

51% ownership and management of for-profit firms by eligible individuals who are:

Black Hispanic Asian American American Indian  
 Female Disabled Disadvantaged

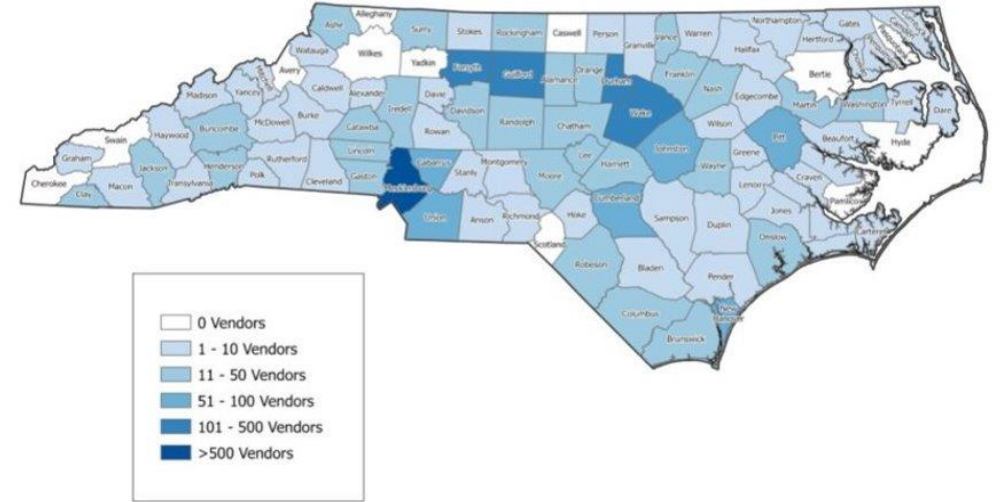
OR

Employee Stock Ownership Plans at least 51% minority owned

Certification lasts 4 years, recertification for additional 4 year terms

No fee to apply

## North Carolina Certified Small Business Enterprises by County



Total NCSBE Certified Vendors as of March 19, 2024: 2,754

### NCSBE Certification:

- Headquartered in NC
- For Profit
- \$1.5 Million in Annual Revenue or less (after cost of goods sold)
- 100 or fewer employees

Certification managed by the HUB Office.

Lasts four years.

Race and Gender Neutral





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# Supplier Diversity Initiatives

HUB *Champions* develop and manage supplier diversity initiatives within their cabinet agency, which aim to identify, engage, and support HUBs as suppliers or contractors.



# Outreach and Education

HUB *Champions* conduct outreach efforts to connect HUBs with procurement opportunities, providing information and resources to help HUB vendors to navigate the state and procurement procedures. This may involve creating training sessions, meet the purchaser, or briefing/coaching a HUB vendor on areas of improvements.

# Partnerships and Collaboration



HUB *Champions* collaborate with the HUB office attend our outreach events and connect the HUB office with prime vendors and organizations that support the mission of the HUB office and build partnerships that expand the HUB office, and our HUB firms while promoting HUB participation in procurement activities.



# Monitoring and Evaluation

HUB *Champions* track and evaluate the effectiveness of HUB procurement programs, monitoring metrics such as HUB participation contract awards, and economic impact to assess progress and identify areas for improvement.



# HUB *Champions* are Intentional

## HUB *Champions*



Select Opportunities and **match** a HUB vendor



**Contact** a HUB vendor for an informal bid opportunity



Have a debrief with a vendor when they were not awarded the contract



Contact the HUB office to assist with identifying HUB firms for an opportunity



Assist a vendor in contacting HUB to be certified

- Attend a HUB outreach event, such as MEDWeek or SCO reception
- Create a training session or present training to HUB firms
- Unbundle a bid for smaller opportunities to include multiple vendors
- Attend HUB training sessions how to search for HUB vendors
- Share training needs with the HUB office for HUB vendors
- Attended a procurement meeting



Thank You for being a HUB *Champion*!!

# Resources

# HUB *Champions*



Alicia Lyon  
DOA



Bryan Gupton  
DOC



Meredith Swartz  
DOA



A close-up photograph of a person's hand with fingers resting on a Braille surface. The background is a soft, out-of-focus brown and orange gradient.

# Disabled Business Enterprises and Nonprofit Work Centers for the Blind and Severely Disabled

- **SELF IDENTIFIED CATEGORIES as of March 19, 2024:**
  - Disabled Business Enterprise (DBE): 916 vendors, \$3,999,715
  - Nonprofit Work Center for the Blind and Severely Disabled (NPWC): 74 vendors, \$10,897,049
    - Not HUB Certification categories
    - Counted for Goods & Services spend per NC General Statute 143-48
    - Not counted as HUB dollars or for HUB participation

# Correction Enterprises Overview



**Martin Kish**

Chief Business and Administrative Officer

Department of Adult Corrections





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# *Pursuing Strategic **Transformation***

## *An Overview of Correction Enterprises*

*Martin Kish, Deputy Director*



# Correction Enterprises is a Big, Complex Business

**\$121M  
Sales**

**\$80M  
Purchases**

**27 Plant  
Operations**

**1,500  
Employees**

**20,000  
Products**

**18  
Industries**



*Not Just Making It Right. Making It Better.*



[www.correctionenterprises.com](http://www.correctionenterprises.com)

## Martin Kish

DEPUTY DIRECTOR  
CHIEF BUSINESS AND  
ADMINISTRATION OFFICER

2020 Yonkers Road  
Raleigh, NC 27604  
4240 Mail Service Center  
Raleigh, NC 27699-4240

Office: 919.324.1324  
Mobile: 919.218.1522  
[martin.kish@dac.nc.gov](mailto:martin.kish@dac.nc.gov)

*Correction Enterprises  
is a division of the*





*Not Just Making It Right. Making It Better.*

**MARTIN KISH**

**HUMAN TRANSFORMATION**



# Definition of Transformation

“A thorough or dramatic change in form or appearance.”



# Definition of Transformation

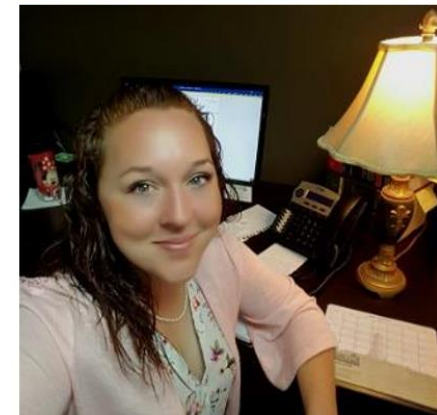
“A thorough or dramatic change in your direction, beliefs, habits or behavior.”







# HOW?



# • § 148-129. Purposes of Correction Enterprises

(1) **Provide** incarcerated offenders a work and training environment that **emulates private industry**.

(2) **Provide** incarcerated offenders with training opportunities that allow them to **increase work skills and employability** upon release from prison.

(3) **Provide** quality goods and services.

(4) Aid victims by contributing a portion of its proceeds to the Crime Victims Compensation Fund.

(5) **Generate sufficient funds from the sale of goods and services to be a self-supporting operation.**

(2007-280, s. 1.)

## 5) Generate sufficient funds from the sale of goods and services to be a self-supporting operation.

- No state tax dollars
- No grants
- No fundraising
- No bank loans
- **“You’re on your own, guys...you gotta sell, market and provide great products and services to keep your jobs!”**  
(And fund our own salaries and pay raises that other agencies receive tax dollars for.)

# How are we supposed to do that?

- Thank God, the State has given Correction Enterprises a lot of power and control through the legal statutes!



# § 148-131. Powers and responsibilities.

In order to fulfill the purposes, set forth in G.S. 148-129, the Section of Correction Enterprises of the Division of Adult Correction is authorized and empowered to take all actions necessary in the operation of its enterprises.

Employ inmates and any other personnel that may be necessary

Expand, diminish, or discontinue any enterprise

Purchase any machinery, equipment, materials, and supplies required

Market, sell and price the goods and services produced

Plan and establish new industrial, agricultural, and service enterprises

Execute and enter into contracts

# § 148-134. Preference for CE Products (001A)

## Agencies Must Purchase FIRST from CE Unless...

- Standard specs or reasonable requirements or insufficient supply can't be met, then a waiver is given

## Exemption from Competitive Bidding

- Statutes “shall not apply” to articles or commodities available from CE

## Pricing Requirement

- Keep pricing “substantially in accord with” prices of similar articles of equivalent quality.

**So, why do you think the state has given Correction Enterprises this much power to exist in perpetuity?**

**It all comes down to what's on our business cards.**

# WHY?

## *Human Transformation?*

(1) **Provide** incarcerated offenders a work and training environment that emulates private industry.

(2) **Provide** incarcerated offenders with training opportunities that allow them to increase work skills and employability upon release from prison.



# WHY?

## *Human Transformation?*

- Murderers into telemarketing professionals
- Drug dealers into award-winning customer service agents and salespeople
- Criminals into better moms and dads
- Entire families transformed for generations to come



# Only One KSA Required to Work for Us



# A Personal Question...

**Are YOU involved in  
Human  
Transformation?**



# ***Human Transformation?***

- Children, Grandchildren?
- Spouse/Partner?
- Best Friends?
- Managers, Direct Reports?
- Self Transformation?
- Assisted Transformation?

# So, What's on Your Business Card?

- Procurement Director/NC25
- Procurement Manager/NC22
- Procurement Specialist I/NC09
- Procurement Specialist II/NC12
- Procurement Specialist III/NC16
- Procurement Technician/NC05

***Human  
Transformation?***

**Yes!**

**Through Your Assistance and  
Service to Correction Enterprises**

**WHY?**

***Human Transformation?***

***Purchasing***



**The Smart Choice. The Right Choice.**



# HUB Best Practices



**John Guenther**

Interim Deputy Director  
Data and Compliance Manager

NC Department of Administration, HUB



# About the HUB Office



Created in 1999, the HUB Office was established to:

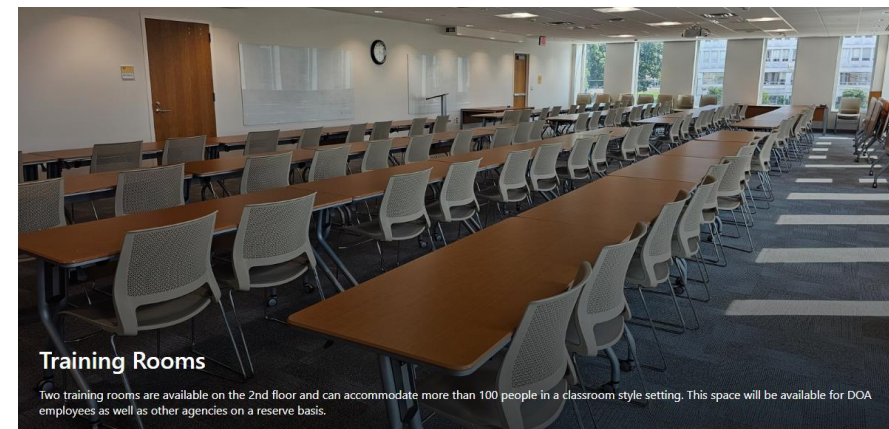
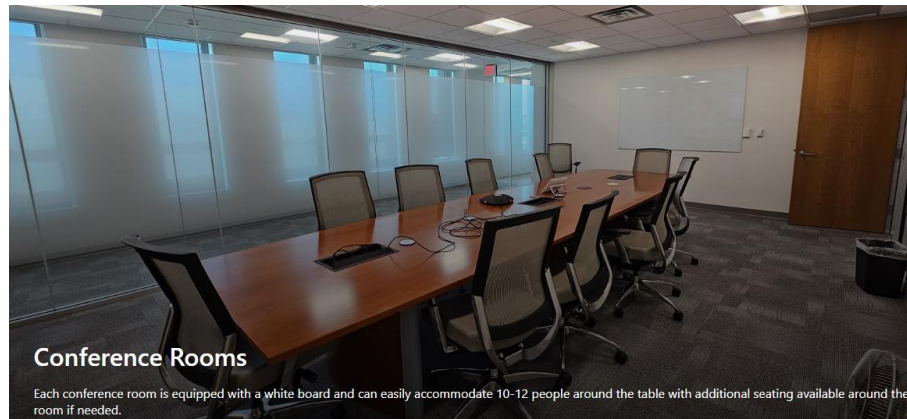
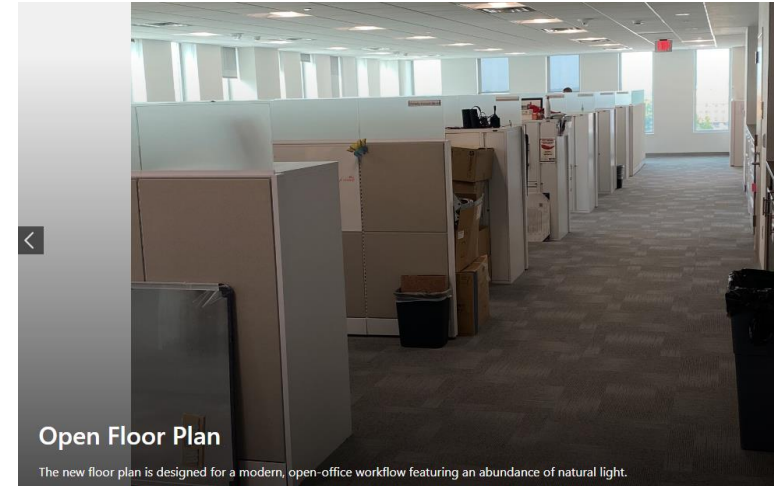
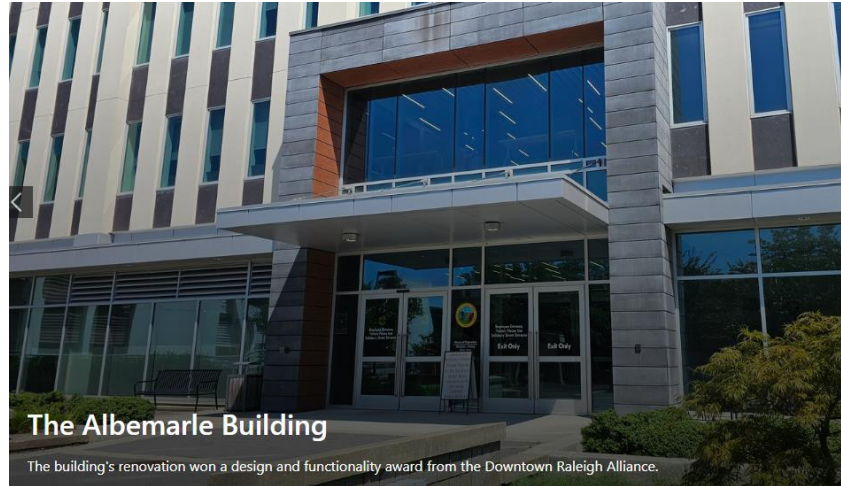
- Increase the amount of goods and services acquired by state agencies from businesses owned and controlled by HUB firms;
- Work towards eliminating barriers that reduce the participation of HUB firms in the marketplace, and in state government procurement and contracting;
- Encourage purchasing officers and capital project coordinators within the state agencies, departments, universities and community colleges to identify and utilize HUB vendors, contractors and service providers;
- Educate HUB firms on “How To Do Business” with the State of North Carolina; and
- Provide resources for HUB firms.





# We are moving to the Albemarle Building!

Our mailing address has not changed but our office will be more modern, with more conference rooms and space for trainings just across the street from our old building in Downtown Raleigh.



# Why we look for HUB Vendors



## [Executive Order #25:](#)

- “It is vital that all North Carolinians have an opportunity to contribute economically by participating in business opportunities existing in government”
- Set goal for Goods and Services at 10%.

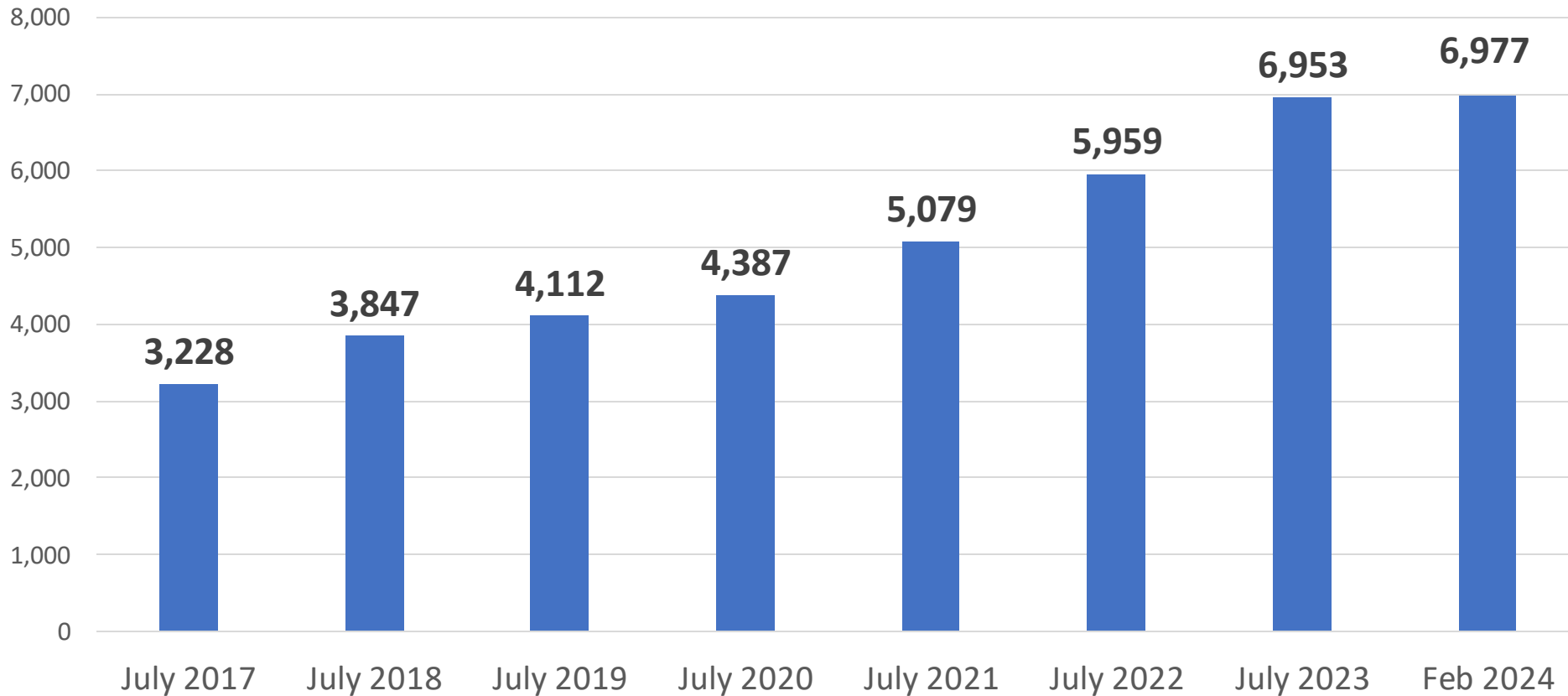
## [NC General Statute 143-48:](#)

- "It is the policy of this State to encourage and promote the use of small contractors, minority contractors, physically handicapped contractors, and women contractors in State purchasing of goods and services."
- Covers goods and services reporting by state agencies, public universities, community colleges and school systems.
- Defined Disabled Business Enterprise and Nonprofit Work Center for the Blind and Severely Disabled.

## [NC General Statute 143-128.4:](#) Statewide Uniform Certification

- Defines Historically Underutilized Business, DOA manages HUB certification.
- Only Certified HUBs count toward minority business participation.

# HUB Certifications Over Time



There are now over 7,000 certified HUB vendors.

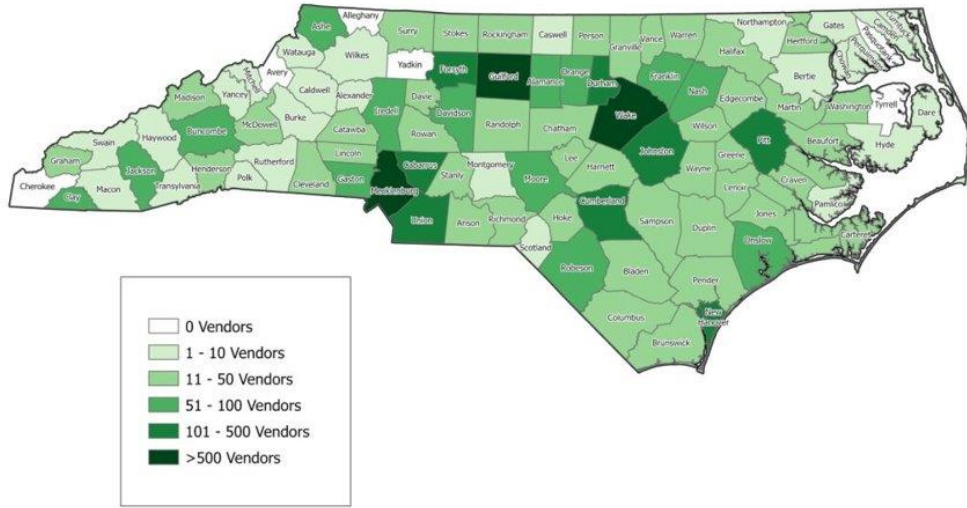
The HUB Office processed an average of over 338 HUB applications per month in FY 22-23.



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## HUB Certifications by County



Total HUB Certified Vendors as of March 19, 2024: 7,045

51% ownership and management of for-profit firms by eligible individuals who are:

Black Hispanic Asian American American Indian  
 Female Disabled Disadvantaged

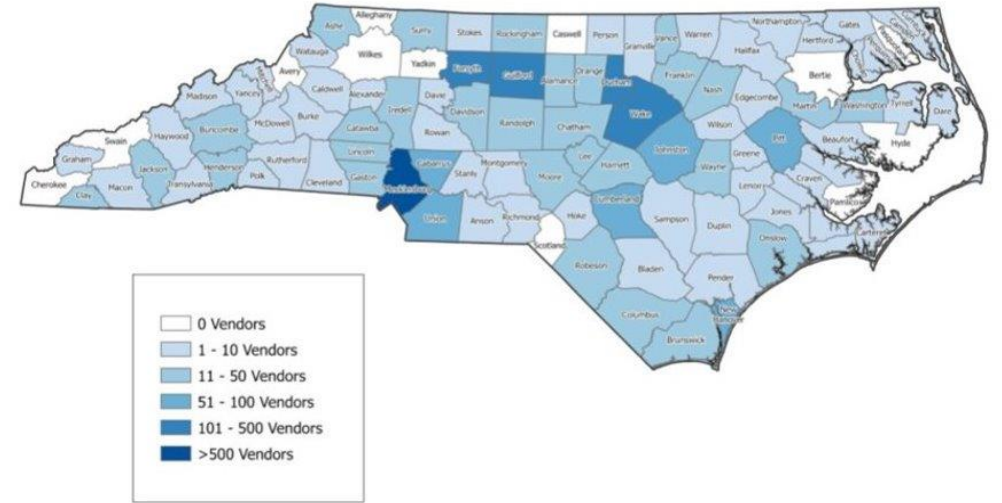
OR

Employee Stock Ownership Plans at least 51% minority owned

Certification lasts 4 years, recertification for additional 4 year terms

No fee to apply

## North Carolina Certified Small Business Enterprises by County



Total NCSBE Certified Vendors as of March 19, 2024: 2,754

### NCSBE Certification:

- Headquartered in NC
- For Profit
- \$1.5 Million in Annual Revenue or less (after cost of goods sold)
- 100 or fewer employees

Certification managed by the HUB Office.

Lasts four years.

Race and Gender Neutral

# Outreach and Trainings



FY 22-23

- Total events: 207
  - Virtual events: 70
- Total attendees: 8,034
  
- HUB Certification: 47 events
- Trainings: 48 events
- Outreach: 84 events



# Where we go...

Ahoskie

Asheville

Bolton

Burlington

Castle Hayne

Chapel Hill

Charlotte

Concord

Durham

Fayetteville

Greensboro

Greenville

High Point

Pembroke

Pinehurst

Raleigh

Rocky Mount

Wilmington

Wilson



# Events we supported (or will)...



Raleigh Small Business Expo

MBDA Export Summit

Greater Durham Chamber of Commerce

NC DIT HUB Vendor Day

Take No Bull Conference

UNC Wilmington – Meet the Contractors

City of Charlotte Business Connections

Guilford County Schools Training & Outreach

Department of Adult Correction Administrative Officers Business Conference

Outreach with the North Carolina Office for Resiliency and Recovery

Minority Enterprise Development Week (MEDWeek)

Military & Veteran Summit



# HUB Usage



Goods and Services	Total HUB (\$)	Total Dept. (\$)	Total HUB (%)
Fiscal Year 2022-2023	\$716,457,380	\$10,870,347,485	6.59%
Fiscal Year 2023-2024 (so far)	\$314,227,228	\$3,588,919,710	8.76%

Agency Group	# Reporting	# Reporting 10%+ HUB
Cabinet Agencies	11	5
Community Colleges	58	12
Council of State	9	3
Public Schools	115	21
State Universities	19	2
Supporting Agencies	15	9
<b>Total</b>	<b>227</b>	<b>52</b>



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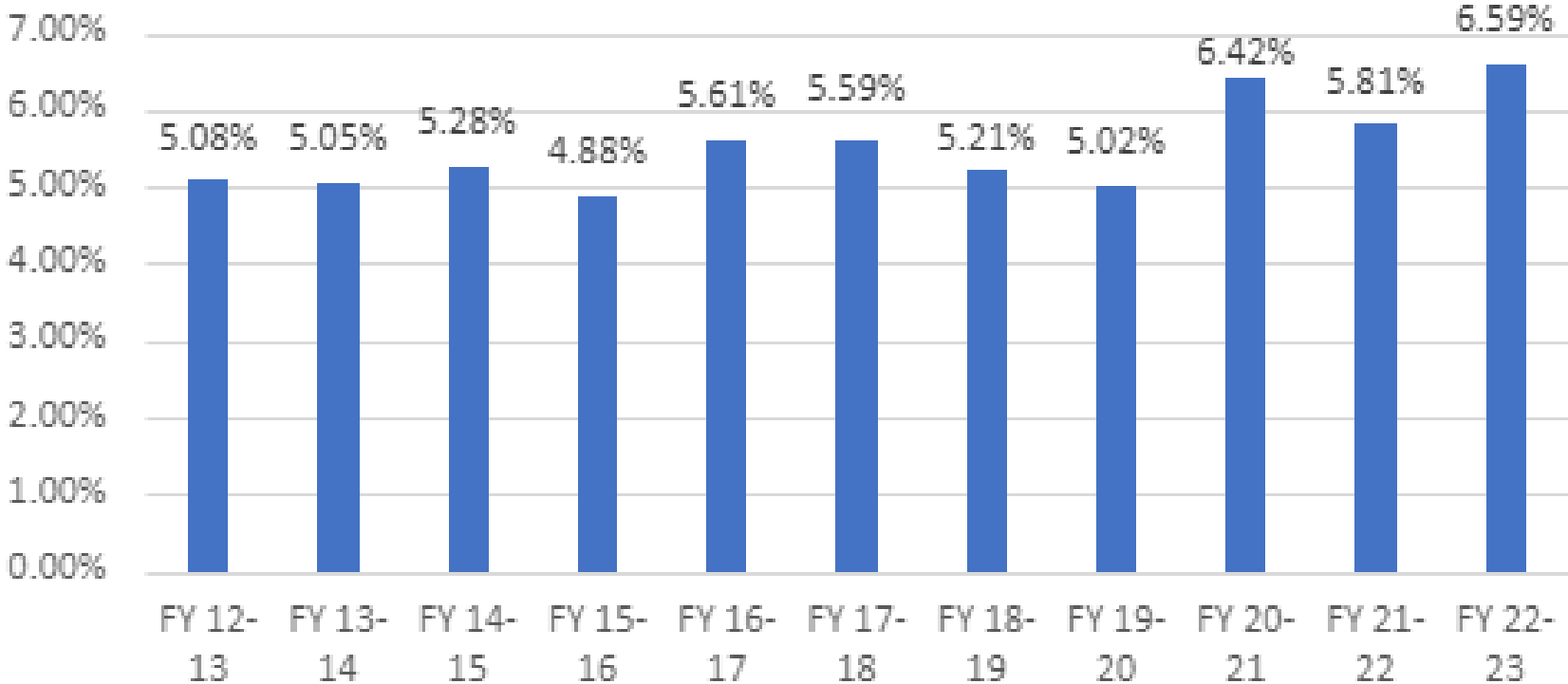




# HUB Participation

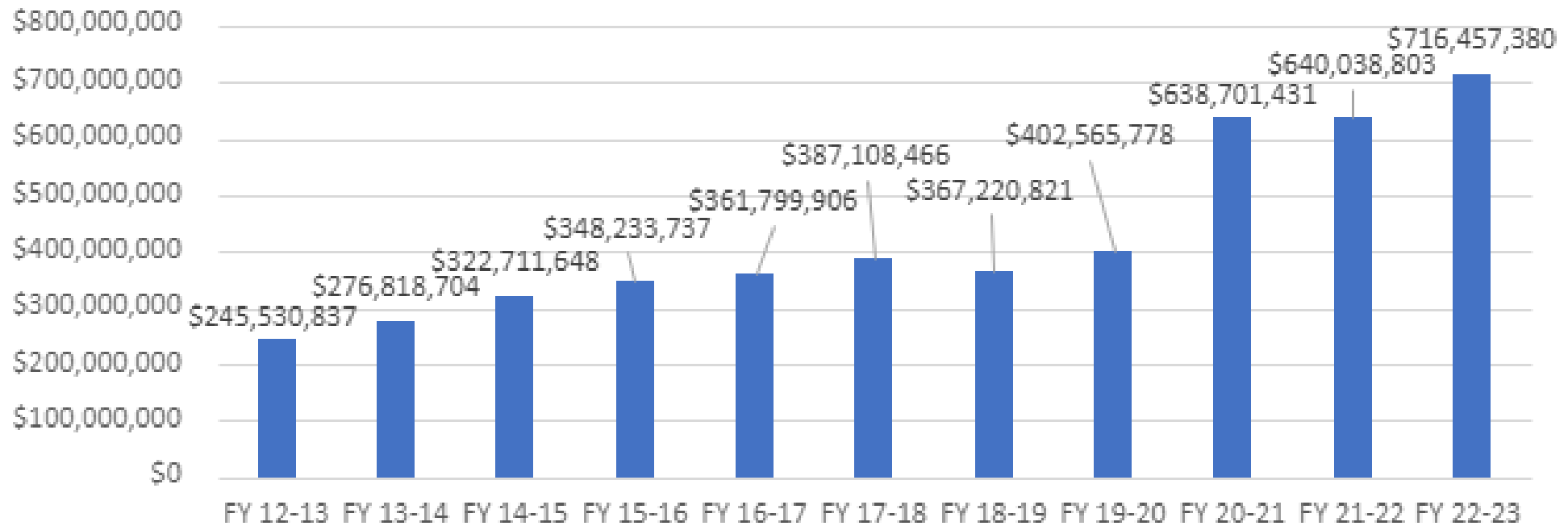


## HUB Participation Goods and Services FY 12-13 through FY 22-23



# HUB Spending

## Goods & Services Spending with HUBs FY 12-13 through FY 22-23



# Who is meeting the 10% goal?

## State Agencies

NC Dept of Commerce 12.46%  
NC Dept of Environmental Quality 12.43%  
NC Dept of Natural & Cultural Resources  
20.21%  
NC Dept of Public Safety 12.85%  
NC Dept of Revenue 12.49%  
NC Dept of Labor 24.79%  
Lieutenant Governor (DOA) 12.34%  
Secretary of State 33.81%  
NC Education Lottery 22.30%  
Office of the Governor 31.65%  
State Board of Elections 55.94%

## Community Colleges (examples, not full list)

Central Carolina Community College 13.51%  
Central Piedmont Community College 13.25%  
Cleveland Community College 16.57%  
Guilford Tech 19.02%  
James Sprunt Community College 11.18%  
Martin Community College 12.05%  
Robeson Community College 19.76%  
Sandhills Community College 13.69%  
Surry Community College 10.44%

# Who is meeting the 10% goal?



## Public Universities

East Carolina University 10.16%

Winston-Salem State 13.92%

## School Systems

Brunswick County Board of Education 11.25%

Caswell County Schools 28.27%

Charlotte/Mecklenburg Schools 11.80%

Columbus County Board of Education 35.21%

Durham Public Schools 27.82%

Martin Count Board of Education 16.92%

Pamlico County Board of Education 16.48%

Perquimans County Board of Education 27.76%

Rowan/Salisbury Schools 31.89%

Wayne County Board of Education 18.17%

Winston-Salem/Forsyth County Schools 37.31%



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# How Do HUB *Champions* Succeed?

## HUB *Champions*

- Select Opportunities and **match** a HUB vendor
- **Contact** a HUB vendor for an informal bid opportunity
- Have a debrief with a vendor when they were not awarded the contract
- Contact the HUB office to assist with identifying HUB firms for an opportunity
- Assist a vendor in contacting HUB to be certified

## HUB *Champions*

- Attend a HUB outreach event, such as MEDWeek or SCO reception
- Create a training session or present training to HUB firms
- Unbundle a bid for smaller opportunities to include multiple vendors
- Attend HUB training sessions how to search for HUB vendors
- Share training needs with the HUB office for HUB vendors

# How HUB *Champions* Succeed

## Department of Administration

- Very supportive Secretary, brings HUB spending information to Cabinet Secretary meetings to highlight success and encourage improvement from other agencies.
- Developed and present “Purchasing 101” training to HUB vendors.
- Developed and present “I got the Contract, Now What?” training for HUB vendors.
- Dedicated HUB Liaison in Purchasing Division.
- Developed processes to encourage buyers to make sure they include HUB vendors on invitations to bid.
- Facilities Management meets monthly with janitorial contractors to discuss issues, challenges and how to better work together. HUB Office participates in those meetings.
- Purchasing provides HUB a forecast report monthly of upcoming procurements.

[HUB Purchasing 101 Vendor Orientation Mar 13, 2024 \(youtube.com\)](#)

[Vendor Contract Management Training Course Feb 6, 2024 \(youtube.com\)](#)

# How HUB *Champions* Succeed

## Department of Transportation

- Regularly present “Purchasing 101” training to HUB vendors.
- Dedicated HUB Liaison in Purchasing Division.
- Combined monthly training on HUB and DOT Disadvantaged Business Enterprise Certifications.
- NCDOT Purchasing outreach events for HUB vendors:
  - Lunch & Learn.
  - Tips & Tools.
- Temporary Traffic Control Training.
- Bidding and Estimating for Truckers Training.
- Opportunities are Knocking: NC DOT Division 3 Projects outreach.
- NC DOT Division 4 Outreach Events.

[HUB Purchasing 101 Vendor Orientation Mar 13, 2024 \(youtube.com\)](#)

# How HUB *Champions* Succeed

## Department of Commerce:

- Very supportive Secretary, talks about it to senior staff, on website, e-mails to staff, reinforced repeatedly.
- Targeted areas that were not meeting HUB goal, looked at why and how they could meet the goal.
  - Targeted maintenance needs, which has improved significantly (janitorial, plumbing, HVAC)
- HUB plan requires requesters to participate in finding HUB vendors.
- If State Term Contract has a HUB vendor, use the HUB vendor.
- Updated internal request for procurement service forms for requesters to make suggestions of specific HUB vendors to invite to bid.
- On request meet with HUB vendors to talk about what the Department needs, understand opportunities, and any mandatory state term contracts.
- Mentoring HUB vendors to understand how to improve bids.
- Participation in HUB sponsored events such as MEDWeek and MBDA meetings.



# How HUB *Champions* Succeed

## Department of Public Safety:

- Supportive Departmental leadership.
- Dedicated HUB Liaison in Purchasing Division.
- Conducts Lunch & Learn events with agency staff.
- Targeted HUB vendor invites to Lunch & Learn events based on agency purchasing needs.
- Face to face meetings with DPS divisions to teach how to find HUB vendors and provide overview of HUB.
- Send out opportunities to HUB vendors directly.
- Planning future outreach events.
- Participating (and helped plan) MEDWeek and HUB Networking Reception and Expo following State Construction Conference.
- Help vendors go through HUB certification process (stay in close contact with HUB Certification team) and encourage updates of commodity codes.
- Encouraging buyers to consider HUB vendors for promotional items.
- Purchasing threshold change July 2023 small purchases increased from \$10,000 to \$25,000.
  - One quote is required and have evidence that a HUB vendor was solicited.
- For informal purchases (\$25,001 to \$50,000):
  - Minimum of three vendors must be solicited, with one being a HUB.
- Attending pre-bid meetings, sharing about HUB and how to do business with the Department.

# How HUB *Champions* Succeed

## **Department of Adult Correction:**

- Dedicated HUB Liaison in Purchasing Division.
- Invited HUB Office to discuss HUB goals and methods of finding vendors at two agency conferences which included meet the purchaser opportunities:
  - Administrative Officers Business Summit.
  - Support Services Statewide Training Seminar.
- Monthly Lunch and Learn with HUB vendors.
- Monthly Lunch and Learn with DAC end users.
- Regional Meet and Greet with HUB vendors and end users.
- Weekly Roundtable discussion with DAC Purchasing Staff on trends and any policy changes.

# How HUB *Champions* Succeed

## **HUB Liaison:**

- Role or position in an agency whose focus is to help increase awareness within their agencies about HUB goals and ways to reach out to HUB vendors.
- Often connected to Purchasing.
- Do outreach to vendors, identifying potential firms that can meet agency needs.
- May conduct trainings with vendors to help understand agency processes.
- May assist vendors in recognizing their eligibility for HUB certification.

## **Agencies with HUB Liaisons:**

Dept of Administration

Dept of Adult Correction

Dept of Information Technology

Dept of Natural & Cultural Resources

Dept of Transportation

Department of Public Safety

Dept of Commerce

# Champions Understand Resources Available

Certification process for HUB and NCSBE is now fully online, including registration, application and upload of documents, through the NC electronic Vendor Portal (eVP).

New vendor search through eVP.

Solicitations posted publicly on eVP automatically get posted to the HUB Office Solicitation Dashboard.

The HUB Solicitation Dashboard now has filtering options to include organization names and expanded types of solicitations that can be identified including architecture and engineering, construction, goods and services, information technology.

The screenshot shows the 'Vendor Search' interface. At the top, there are navigation links for 'Solicitations', 'Vendors', 'Contract Extensions', and 'Sign in'. Below the navigation is a breadcrumb trail: 'Home / Vendors / Vendor Search'. The main heading is 'Vendor Search'. A sub-heading reads: 'To locate a vendor registered in eVP, please use the search filters below. The main search will search across multiple fields in the system, including the vendor's Secretary of State ID and UEI. Targeted search fields are also available to provide a more refined search result set. If additional filters are required, please expand the Advanced Search section.' The search filters include a 'Search' text input, 'Vendor Name' text input, 'Customer Number' text input, 'Vendor Status' dropdown menu, 'HUB Certification Status' dropdown menu, and 'NCSBE Certification Status' dropdown menu. At the bottom, there is an 'Advanced Search' section with a 'Search' button and a 'Reset' button.

The screenshot shows the 'HUB Solicitation Opportunities' dashboard. At the top, there are navigation links for 'Solicitations', 'Vendors', 'Contract Extensions', and 'Sign in'. Below the navigation is a breadcrumb trail: 'Home / Vendors / Vendor Search'. The main heading is 'Vendor Search'. A sub-heading reads: 'To locate a vendor registered in eVP, please use the search filters below. The main search will search across multiple fields in the system, including the vendor's Secretary of State ID and UEI. Targeted search fields are also available to provide a more refined search result set. If additional filters are required, please expand the Advanced Search section.' The search filters include a 'Search' text input, 'Vendor Name' text input, 'Customer Number' text input, 'Vendor Status' dropdown menu, 'HUB Certification Status' dropdown menu, and 'NCSBE Certification Status' dropdown menu. At the bottom, there is an 'Advanced Search' section with a 'Search' button and a 'Reset' button.

# Director's Charge:

How can you help your agency become a HUB Champion?

What have you heard here that you can use to start (or improve) being a HUB Champion?

# 2024 NC PEAK HUB Breakout Sessions

## **Partnering with HUB (offered once)**

**Come for a discussion of ways to collaborate with the NC HUB Office to increase the number of HUB vendors bidding on state and local government work.**

## **How to Find HUB Vendors (offered twice)**

**Come learn about different methods of finding and reaching out to HUB vendors and how to use the new electronic Vendor Portal vendor search to find the firms you need.**



# CONTACT US:

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Businesses

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984-236-0130

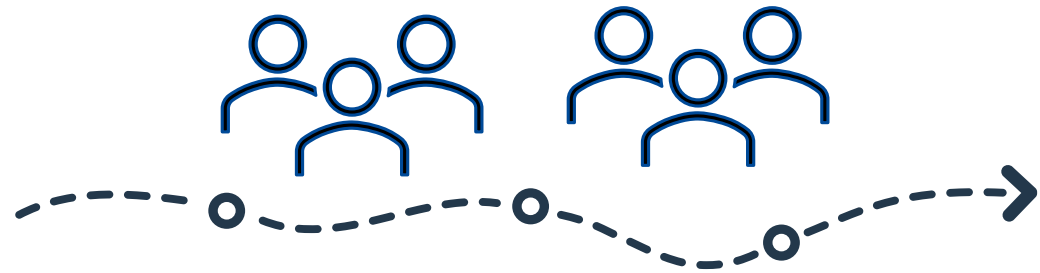
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April 8-9, 2024

**PEAK**  
PROCUREMENT EXCELLENCE AND KNOWLEDGE

MEET THE TEAM







Service Team 1	Melinda Tomlinson
Service Team 2	Sandy Anderson
Service Team 3	Bahaa Jizi
Service Team 4	Shayla Parker
No Service Team	

## Meet the Team

Find your table by matching the color on your badge with the corresponding color on the table.

Take some time to read and discuss the prompts on the table while your service team manager circulates.

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**NC DOA**  
Department of Administration  
Purchase & Contract

# END OF SESSION

THANK YOU FOR JOINING US!

**UP NEXT:** Eclipse break

Vendor Expo in room 7 and room 8

Concurrent Breakout Sessions at 3:40

