Consolidated Purchasing Workgroup - 5/18/2010

Discussion of Campus Purchasing Exception Process for NCSU

DRAFT proposal

Given direction from the North Carolina General Assembly, the Office of the President convened a working group of the campus CIOs to establish a system-wide combined pricing strategy. This strategy was created to establish uniform pricing for all campuses within the system and to provide computer users within the system with a number of standard configurations from participating vendors. There is a clear expectation that the majority of computer purchases within the system that are funded by the State of North Carolina will conform to the standard configurations provided by the combined pricing strategy.

There is a realization that all computing requirements may not be met by the standard configurations and, as a result, each campus within the UNC-System is tasked with creating a policy to govern when exceptions to the standard configurations are appropriate, a defined process for computer users to follow to request an exemption, and guidelines of what constitutes grounds for exemptions.

Exceptions

Although it is recommended that all computer purchases within the criteria of the program use the standard configurations to the extent possible, this procedure governs purchases funded by the State of North Carolina. There are several types of purchases including exceptions addressed by this process; standard configurations, minor variations from the standard configurations, and systems outside of the standard configurations.

Initially, this process addresses laptops and desktops although netbooks and all-in-ones are expected to be added in the near future.

Process

There will be several levels of approval for purchases, some of which will require an individual’s or committee’s approval before the purchase can be completed. The process will deal with purchases of computers through the MarketPlace and address standard configurations, minor variations from the standard configurations, and systems outside of the standard configurations.

Standard Configurations:

Standard configurations with or without standard options will be presented to Purchasing for processing without further approval.

Minor variations to Standard Configurations:
Purchases of configurations that conform to the standards with options not on the approved options list would be approved by the dean or designee for that unit. The Dean, Vice Chancellor or Vice-Provost of a unit can appoint a designee or committee to these purchases. The MarketPlace workflow is expected to have an approval by the purchasing unit in addition to the existing financial approvals.

**Non-Standard Configurations:**

Configurations and options outside of the standards would have to be approved by a University committee with positive approval from the unit. It is proposed that the University committee consist of a small college representative, a large college representative, an OIT representative, a Purchasing representative, and, if the CIO deems it prudent, additional representative(s). It is expected that a unit representative forward non-standard requests to the University committee and will present the reasons for and the unit’s support of the non-standard configuration’s purchase. The MarketPlace workflow is expected to have an approval by both the purchasing unit and the University committee in addition to the existing financial approvals.

Designees can add to approval workflow in MarketPlace as appropriate such as a referral to the appropriate Dean or Vice-Chancellor for items that need additional approval within a unit.

**Reporting**

Under the guidelines from the UNC-System and the General Assembly, NCSU will have to document the success of this program and provide reports addressing the percentage of computer purchases under the program that adhere to the standard configurations and those that do not.

Purchasing can also provide feedback to the units based on information within the MarketPlace system on whether purchased are meeting the standards.

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**Items Still Open**

How to: the universities are expected to report non-standard purchases back to the system. What level of granularity is needed?

How often?

What reporting delay is acceptable, if any?

Who at vendors should be contacted about the catalog of standard offerings to be integrated into marketplace?