



HOW TO DO BUSINESS WITH THE CRVA

FREQUENTLY ASKED QUESTIONS

HOW TO DO BUSINESS WITH THE CRVA

FAQ

BACKGROUND

The Division of Purchase and Contract of the State of North Carolina originates purchasing policies and procedures. The applicable procedures must be followed in the purchase of supplies, materials and equipment. Specific issues regarding purchasing should be addressed to the Procurement Specialist or to the Director of Finance. Procurement opportunities may be available in the following areas:

Office Supplies	Pest Control	Office Furniture and Equipment	Temporary Set-Up Services
Peer Group Security	Radio Maintenance	Specialty Food Items	Temporary Janitorial Services
First Aid Services	Life Safety Systems	Audio/Visual	Uniform Services
Clean-up Labor	Maintenance	Advertising Design	Mat Services
Ticketing System	Armored Car Deposit	Advertising Placement	Dumpster/Waste Removal
Concession Stand Staffing	Payroll Services	Printing Service	Grounds Maintenance
Chemicals	Computer Hardware Support	Safety equipment	HVAC Maintenance
Paving and Concrete Work	Computer Software Support	Construction	Elevator Maintenance
Plant Maintenance	Alarm Service Monitoring	Parking Lot Sweeping	
Ice Plant Maintenance	Water Treatment	Parking Lot Staff	

HOW DO I CONTACT THE CRVA PROCUREMENT OFFICE?

Jeff Doerr, Procurement Specialist, can be reached at 704-414-4159 or at jeff.doerr@crva.com. The mailing address is 501 S. College St., Charlotte, NC 28202.

Procurement Management's standard office hours are from 8 a.m. to 4 p.m. and other times by appointment.

MUST A COMPANY HOLD RESIDENCE IN NORTH CAROLINA TO DO BUSINESS WITH THE CRVA?

No. We award bids to the lowest responsible vendor or to those vendors providing the best value solution to the CRVA.

WHAT IF A VENDOR HAS QUESTIONS ABOUT AN INVOICE AND PAYMENT?

If a vendor has a question about an invoice or payment, he/she should contact the Purchasing/Payables Coordinator in Accounting at 704-414-4153. It is important that the vendor have the PO number handy as well as the invoice number.

HOW DOES THE CRVA ADVERTISE FOR GOODS OR SERVICES?

Advertisements for goods and services are solicited by Invitations to Bid and Requests for Proposals and are published in *The Charlotte Observer* and/or *The Charlotte Post*.

DOES PROCUREMENT MANAGEMENT BUY FOR ALL CRVA DEPARTMENTS?

No. Procurement Management handles solicitations for all formal bids with regard to professional architectural or engineering services and construction of capital projects included in the annually adopted Capital Improvements Budget. The Procurement Office supports all CRVA departments with their purchasing needs for goods/services and assists with vendor performance evaluation and relationship management of vendors.

DOES THE CRVA ALLOW TELEPHONE QUOTES?

Yes. Telephone quotes are allowed for supplies and material when the total purchase is below \$5,000. The quotes obtained by telephone must be documented with the description of the item being quoted, the name of the company, telephone name and telephone number of the person providing the quote, and the amount of the quote.

HOW TO DO BUSINESS WITH THE CRVA

FAQ (CONTINUED)

WHAT ARE THE PROCUREMENT BIDDING LEVELS?

Procurement has the following bidding levels:

- Goods costing less than \$5,000 may be handled by the department manager by any reasonable means.
- Goods with a total cost between \$5,000 and \$90,000 require written quotations from a minimum of three sources by fax, U.S. mail or email.
- Goods costing more than \$90,000 require a formal sealed bid process.
- Capital projects/equipment costing less than \$500,000 requires written quotations from a minimum of three sources by fax, U.S. mail or email. If the expense is \$500,000 or greater, the formal sealed bid process is required.

CAN A VENDOR SEND A SOLICITATION PACKAGE BY FACSIMILE OR EMAIL?

No. Formal advertised sealed bids/proposals will not be accepted via fax or email. However, informal quotes may be faxed or emailed.

IF A VENDOR HAS A QUESTION REGARDING THE SPECIFICATIONS OR REQUIREMENTS, WHOM CAN THEY ASK FOR CLARIFICATION?

Any question concerning the solicitation should be directed, in writing, to the person whose name and contact information is listed in the solicitation. Correspondence must reference the specific section in question. No verbal response or interpretation that constitutes a material change to the solicitation is binding unless it is issued as a written addendum to the solicitation.

CAN A VENDOR TURN IN A BID LATE?

No. It is the vendor's responsibility to ensure that a bid/proposal is physically delivered to the correct location prior to the time and date specified in the solicitation document. Late bids will not be opened.

DOES A VENDOR REALLY NEED TO ATTEND PRE-BID MEETINGS AND SITE VISITS?

Most pre-bid or pre-proposal conferences and site visits are not mandatory but highly recommended. However, in order to offer a responsive bid or proposal, it is highly recommended that the vendor attend these meetings. Unawareness of existing conditions is not an acceptable excuse for non-performance at a later date.

WHAT ARE SOME COMMON MISTAKES MADE DURING THE BID SUBMITTALS?

The CRVA has little flexibility if the bid a vendor submits does not respond to all specifications and requirements outlined in the bid. It is critical that a vendor submit a bid that is correct the first time, or the CRVA may not be able to consider the bid. Here are some things for a vendor to keep in mind:

- Be timely. Vendors must submit bids by the date and time specified. Late bids cannot be considered.
- Read the bid conditions.
- Be responsive.
- Bid on items and in quantities that the bid requests.
- Failure to adhere to the bid conditions may result in rejection of the bid.

WHAT DETERMINES WHEN A BID/PROPOSAL CAN BE REJECTED?

Proposals may be rejected by the CRVA for any reason determined as in the best interest of the organization. However, the proposal shall not be rejected for the purpose of circumventing the informal or formal bidding process. The CRVA reserves the right to discuss and negotiate with selected contractor(s) any terms and conditions in the proposal including, but not limited to, financial terms.

HOW TO DO BUSINESS WITH THE CRVA

FAQ (CONTINUED)

WHAT ARE THE BONDING REQUIREMENTS?

There are several types of bonds that may be required: bid bond, performance bond and payment bond. Bonds are normally not required for equipment purchases. However, Procurement may require a bond if it is believed to be in the CRVA's best interest. Bonds may be issued by an approved surety firm or be in the form of a cashier's check.

- A bid bond guarantees that the bid provided is given in good faith and that the bid, when awarded, will be satisfied by execution of a contract or purchase order.
- A performance bond is solely for the protection of the CRVA when constructing a project. The bond is usually in the amount of one hundred percent (100%) of the construction contract amount, conditioned upon the faithful performance of the contract in accordance with the plans, specifications and conditions of the contract.
- A payment bond is conditioned upon the prompt payment for all labor or materials for which a contractor or subcontractor is liable. It is usually in the amount of one hundred percent (100%) of the construction contract amount.

IS A MWBE FIRM ASSURED OF GETTING A CONTRACT WITH THE CRVA?

The goal of the CRVA's Vendor Diversity Program is to provide minority-owned and women-owned business enterprises (collectively "MWBE") as well as other responsible vendors with a fair and reasonable opportunity to participate in the CRVA's business opportunities. CRVA staff involved in the procurement of goods and services are expected to make good faith efforts to utilize MWBE vendors in accordance with the CRVA's Vendor Diversity Program Policy.

HOW DOES THE BID EVALUATION PROCESS WORK?

Depending on the complexity of the solicitation, it can take from several days to several weeks to evaluate all of the bids/proposals submitted. For bids/proposals involving commodities, management must make sure that vendors are bidding on the same items and in the same units and quantities. Once it is determined that bids/proposals are comparable, the vendor with the lowest responsible bid will be awarded the bid.

For bids/proposals that involve services, several criteria are taken into consideration, including, but not limited to: qualifications, experience, approach, financial stability, cost efficiency, and acceptance of CRVA terms and conditions. While cost is a consideration, it is not the overriding factor in a decision to award. In determining "best value" in procurements, other factors, including the following are considered:

- The reputation of the vendor and the vendor's goods and/or services.
- The quality of the vendor's goods and/or services.
- The extent to which the goods and/or services meet the CRVA needs.
- The vendor's past relationship with the CRVA.
- The impact on the ability of the CRVA to comply with the laws and rules regarding the procurement of goods and/or services.
- Adherence to the CRVA's Green Initiative regarding purchase of environmentally preferable products.
- Any other relevant factor regarding the particular good and/or service.

DOES THE CRVA GIVE SOLICITATION RESULTS OVER THE TELEPHONE?

Solicitation results for Invitations to Bid may be given over the phone. You may call 704-414-4159 after the bid opening, and the Procurement Specialist will provide you a bid tabulation where applicable. However, a bid tabulation will be supplied only after a final decision has been made to award the bid.

A Request for Proposal does not result in a bid tabulation, as the process of evaluation is generally longer than that of an Invitation to Bid and is not based on price. Solicitation results for Requests for Proposals may be available, upon written request to the Procurement Manager, after final evaluations are complete.

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FAQ (CONTINUED)

CAN A VENDOR GET INFORMATION REGARDING SOLICITATIONS AFTER SUBMISSION OR IF THEY DID NOT BID?

Yes. Please call the Procurement Specialist at 704-414-4159.

WILL A VENDOR GET A SIGNED CONTRACT FROM THE CRVA?

Because the CRVA relies heavily on competitive bidding, no department knows which bidder will receive an award until sealed bids are opened and evaluated, or in the case of services and technology, proposals have gone through the evaluation process. This means that no one can give assurance that a vendor will receive a particular contract. No service should be provided and no goods should be delivered before the winner of the bid and the CRVA signs a written contract or a purchase order is generated.

A formal contract is officially awarded for a purchase of supplies, materials and equipment over \$90,000, and all capital improvements/construction projects upon approval by the appropriate Manager, Procurement Specialist and Director of Finance. Once approved, a written and signed contract and/or a purchase order will be produced. Informal purchase of supplies, material and equipment between \$5,000 and \$90,000 will be awarded upon the approval of the appropriate manager and the Procurement Manager. A contract and/or purchase order is generated.

WHEN DOES A VENDOR NEED THE PO NUMBER?

The vendor must include the Purchase Order number on the outside of the package, packing slip and all invoices. This will enable the CRVA to identify the correct department or individual as the recipient and ensure prompt payment.

The requesting department must verify that the order was received, complete and in good condition. Once the invoice is approved by the requesting department, it is routed to A/P for payment.

WHAT DOES A VENDOR NEED TO KNOW ABOUT DELIVERY?

For most orders, the delivery point is the location noted in the "ship to," where the item or service will be used. A vendor should note carefully the delivery address in the bidding and order documents. The vendor is responsible for delivering to the final destination specified in the order. Deliveries to departments are typically made by a transportation company, the vendor's truck or through the U.S. Postal Service.

DO DEPARTMENTS HAVE A CHANCE TO INSPECT GOODS?

All goods are considered received by the CRVA only after the requesting department inspects them to be certain all items are received and in good condition. After inspection and any necessary tests have been performed, the department will approve the invoice. Services are considered delivered only after the CRVA "accepts" the deliverables in accordance with specific acceptance criteria that are outlined in the contract and/or purchase order.