STANDARD OPERATING PROCEDURE

SOP Number: Purchasing and AP 22-03

SOP Title: Statewide Term Contracts

Effective Date: 3/1/22

Revised Date 1/9/24

1. PURPOSE

The purpose of this Standard Operating Procedure is to provide guidance and outline the use of statewide term contracts.

Statewide Term Contracts (STC) are established by P&C for state agency use and are competitively bid. During the process of establishing STCs, P&C considers several factors, which include:

* Which items are most used or purchased by the state
* Whether lower prices can be obtained through volume discounts
* Whether transportation costs are included in the pricing
* Whether warranties may be included in the contract
* The availability of online catalogs within NC eProcurement for order processing efficiency

1. SCOPE

This SOP applies to Western Carolina University employees, departments, and divisions.

1. RESPONSIBILITIES
   1. Chief Purchasing Officer – The Chief Purchasing Officer is responsible for ensuring compliance and biennial review of the policy.
2. DEFINITIONS
   1. Statewide Term Contract A “term contract” is a contract where a vendor agrees to provide goods and services at set prices, for an agreed contract term, and pursuant to specific terms and conditions. No set quantity is provided, but estimates are often given based on forecasted usage. It is also  
      referred to as a “requirements contract” or “indefinite quantity contract.”
   2. Mandatory STCs shall be used by state agencies, departments, institutions, universities, and community colleges, unless exempted by statute or rule. Other entities, including schools and local government, may use these contracts, as provided in the contract.  
      01 NCAC 05B .1101; G.S. 143-49.
   3. Convenience STC’s may be used by state agencies, departments, institutions, universities, community colleges, and other entities, including schools and local governments, as provided in the contract. G.S. 143-49.6
3. SPECIFIC PROCEDURE
   1. The pricing and terms for each STC are available on the P&C website. All goods and services covered by an STC must be purchased in accordance with the established priority from above and with instructions for that contract. For example, some STCs may specify a minimum or maximum quantity or dollar value for each order. Read each contract carefully prior to ordering. Orders valued less than any minimum quantity indicated on the contract synopsis shall be obtained in accordance with normal agency procurement procedures.  
      Orders that exceed any maximum quantity shall be forwarded to P&C for processing.
4. RESOURCES

North Carolina Procurement Manual:

<https://files.nc.gov/ncdoa/documents/files/NC-Procurement-Manual-2022-with-TOC.pdf>

NC Administrative Code 05B .1102

[http://reports.oah.state.nc.us/ncac/title%2001%20 %20administration/chapter%2005%20 nc sta%20purchase%20and%20contract/subchapter%20b/01%20ncac%2005b%20.1102.pdf](http://reports.oah.state.nc.us/ncac/title%2001%20%20%20administration/chapter%2005%20%20nc%20sta%20purchase%20and%20contract/subchapter%20b/01%20ncac%2005b%20.1102.pdf)

Statewide Term Contracts

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