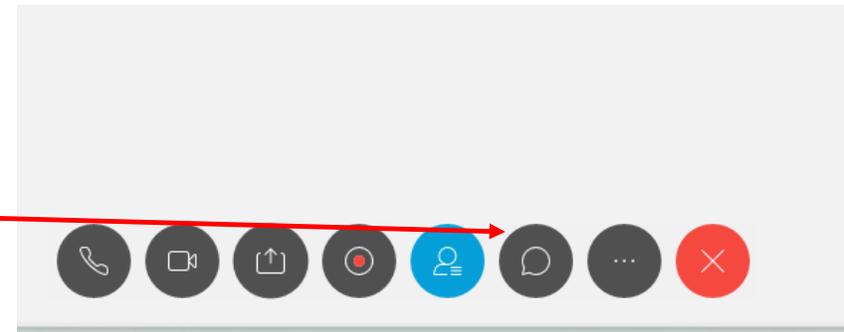




Webinar Welcome

- Please call in to 1-919-662-4658
- Please put yourself on mute
- Do not put us on hold throughout the meeting (otherwise everyone hears your hold music).
- If you need to leave, please disconnect (hang up) and call back in upon your return.
- Please put your name, organization and County in the Chat Box (this is how we will take attendance)





North Carolina Department of Administration

Historically Underutilized Businesses Reporting on HUB Purchases of Goods & Services

John Guenther, Compliance Officer

What you will know when this webinar is done:



- Overview of NC HUB Office
- Definition of a Historically Underutilized Business
- How to find HUBs
- Who is required to report on purchases of goods & services
- When reports are due
- How to report in IPS

Basics

State Policy encourages the use of Historically Underutilized Businesses in purchasing of goods and services.

- Reporting covers purchases from term contracts & open market contracts for the current fiscal year
- Purchases from non-governmental entities count toward total purchases
- Only firms certified by the HUB Office count toward HUB participation
- Quarterly reports are submitted using the NC Interactive Purchasing System

HUB Office

The Office for Historically Underutilized Businesses promotes diversity and inclusion in state government procurement and contracting.

The HUB Office is part of the NC Department of Administration

- HUB Certification
- Encourages use of Historically Underutilized Businesses
- Business Development with HUB vendors
- Collects Reports on construction and goods/services purchases

HUB Office website: <https://ncadmin.nc.gov/businesses/hub>



What is a HUB?

NC G.S. 143-128.4



- At least 51% of business is owned by one or more persons who are members of at least one of the groups in 143-128.4 (b)
- The management and daily business operations must be controlled by at least one owner in one of the groups in 143-128.4 (b)
- Certified by HUB Office for 4 years at a time.
- Recertification at end of each certification period.
- Takes about 45-90 days to get certified.
- There is no fee to be certified.
- HUB Certification website:
<https://ncadmin.nc.gov/businesses/hub/hub-certification>

HUB Certification Categories

- Black
- Hispanic
- Asian American
- American Indian
- Female
- Disabled
- Disadvantaged

Self identified categories (HUB does not certify):

- Disabled Business Enterprise
- Nonprofit Work Center for the Blind and Severely Disabled

HUB General Statutes



- [NC General Statute 143-48](#)
 - State policy to encourage use of small and Historically Underutilized Businesses
 - Reporting requirements
- [NC General Statute 143-128.4](#): Statewide Uniform Certification
 - Defines Historically Underutilized Business
 - Department of Administration certifies HUBs and maintains database
 - Only Certified HUBs count toward minority business participation
- Goal of 10% established in multiple Executive Orders

HUB Reporting

Two Types

- Purchasing of Goods and Services
 - Reporting System: Interactive Purchasing System (IPS)
- Construction spending
 - Reporting Systems:
 - HUBSCO (local entities)
 - InterScope+ (state entities)

HUB Purchasing of Goods and Services Expenditure Reporting



Purchasing of Goods and Services expenditure reporting expenditures made by state agencies, community colleges, state universities, and public school systems.

Reporting Periods

Period	Dates	Due Date
1 st Quarter	July 1 to September 30	October 30
2 nd Quarter	October 1 to December 31	January 30
3 rd Quarter	January 1 to March 31	April 30
4 th Quarter	April 1 to June 30	July 30

<http://ncadmin.nc.gov/hub-purchasing-goods-and-services-expenditure-reporting>

Reminders of the reporting due dates are sent each quarter.

Who reports

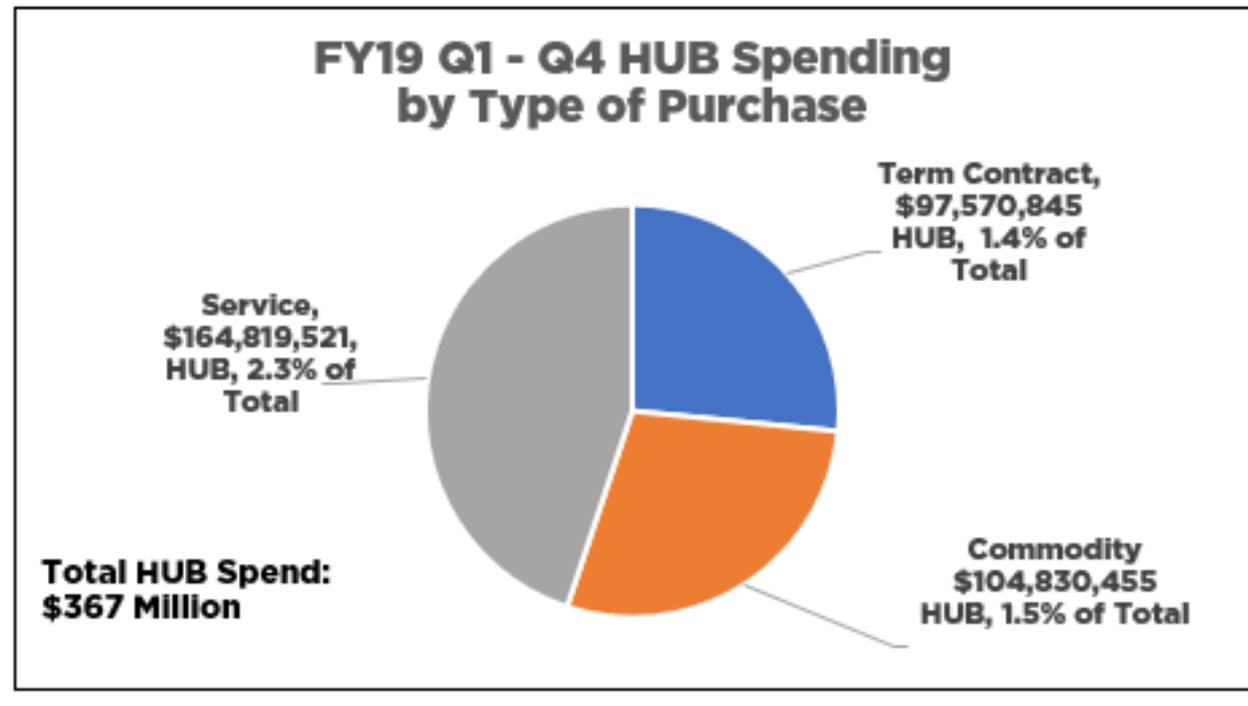
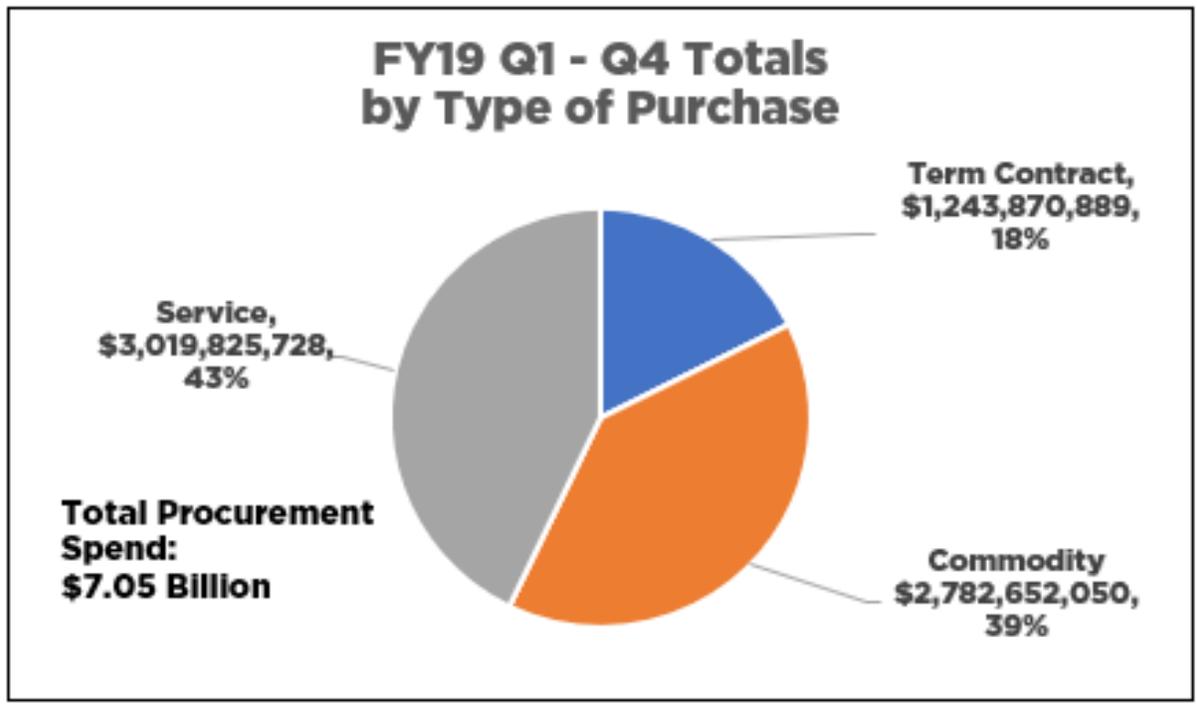
- 10 Cabinet Agencies
- 9 Council of State Agencies
- 9 Support Agencies
- 19 Public Universities / University Institutions
- 58 Community Colleges
- 115 School Systems
- 6 Non-Profits

Purchases of Goods & Services

FY 18-19 Q1- Q4

Agency Category	Total(\$)	HUB(\$)	HUB(%)	# of Entities Reporting	# Reporting 10% or more HUB participation
Cabinet Agencies	\$1,439,085,432	\$74,202,999	5.16%	10	5
Council of State	\$147,096,728	\$6,166,388	4.19%	9	5
Supporting Agencies	\$147,919,229	\$8,374,455	5.66%	15	3
Community Colleges	\$585,876,464	\$43,865,517	7.49%	58	8
Public Schools	\$2,334,164,634	\$155,442,222	6.66%	115	18
State Universities	\$2,392,206,180	\$79,169,240	3.31%	19	3
Total	\$7,046,348,667	\$367,220,821	5.21%	226	42

Purchases of Goods & Services FY19 All Quarters By Type of Purchase



Note: Non-Profits will only report on Services and Commodities and will NOT report on State Term Contract purchases.

FY 19-20 as of 12/17/2019

Agency Category	Total(\$)	HUB(\$)	HUB(%)
Cabinet Agencies	\$416,658,893	\$36,624,839	8.79%
Community Colleges	\$141,427,051	\$8,429,686	5.96%
Council of State	\$65,430,546	\$1,029,204	1.57%
Public Schools	\$785,162,219	\$55,180,093	7.03%
State Universities	\$582,049,474	\$22,924,389	3.94%
Supporting Agencies	\$87,139,696	\$9,459,625	10.86%
Total	\$2,077,867,879	\$133,647,836	6.43%

How to find HUB Vendors



- Statewide Uniform Certification, Search for Vendor Information: <https://www.ips.state.nc.us/vendor/searchvendor.aspx?t=h>
- All firms in this search are HUB certified firms
- Can search by Company Name, City, County, Commodities, Construction specialties
- When searching by Company Name type in just the first few letters of the name
- Using % symbol in Company Name field acts as a wildcard (Example: type %fencing to find companies with “fencing” any where in their name)
- What if a minority vendor is not listed in the search?

State of North Carolina
Office for Historically Underutilized Businesses

Search for Vendor Information

This page allows you to search for vendors by one or more selection criteria. To search for a vendor, enter your search criteria in the form below and click the SEARCH button. If any criteria do not apply simply leave that item blank.

Vendor Number:

Company Name: (type in just the first 3 or 4 letters to expand your results)

Contact Last Name: (type in just the first 3 or 4 letters to expand your results)

Email Address: (type in just the first 3 or 4 letters to expand your results)

HUB Certification: Yes

HUB Vendor Search Example:

- As of July 10, 2018 there are 23 entries for HUB Vendors within Brunswick County.
- 6 of those HUB Vendors have a construction license.
- Click on the Company Name to get more information.

Change Search New Search Create Excel Spreadsheet

Search Criteria:
HUB Certification: Yes
County: 'BRUNSWICK'

Hub Status Abbreviation:
 B = Black, HA = Hispanic, AA = Asian American, AI = American Indian, W = Female, D = Disabled
 SE = Socially and Economically Disadvantaged, DBE = Disabled Business Enterprise

Page 1 of 2 Total of 23 records found

1 2							
<u>Company Name</u>	<u>Address</u>	<u>City, State</u>	<u>County</u>	<u>Zip</u>	<u>Contact Info</u>	HUB	Small Bus.
artesian plumbing, inc.	1205 carabel ct.	Ieland, NC	BRUNSWICK	28451	Contact: palucci, dario Phone: (910)367-6838 x Fax: (910)383-1809 Email: artesianplumbing.palucci@gmail.com	HA	No
artesian plumbing, inc.	1207 carabel ct	Ieland, NC	BRUNSWICK	28451	Contact: palucci, dario Phone: 910-367-6838 x Fax: 910-383-1809 Email: artesianplumbing.palucci@gmail.com	HA	No
Atlantic Shores Environmental	154 Backhoe Road	Leland, NC	BRUNSWICK	28451	Contact: Moody, Cheryl Phone: 910-371-5980 x 910371 Fax: 910-371-6652 Email: cmoody@atlanticshoresenvironmental.com	W	Yes
B & B Crane	5007	Shallotte.	BRUNSWICK	28459-1594	Contact: Powell, Megan	W	Yes

HUB Vendor Search



American Envir. Drilling, Inc.

Detail Information	
Contact:	Guy Veni
Added on: 1/5/2012 9:16:08 AM	
Address:	324 Fields Drive Suite C Aberdeen, NC 28315 MOORE United States
Phone:	910-944-3140
Fax:	910-944-3150
Toll Free:	910-944-3140
Email Address:	guy@aedi.biz

Small Business:	Yes
HUB Certified:	Yes W
Business Type:	Corporation

Service Type/License/Work Classification
Electrical Contractor - NONE General Trades/Sub Contractor NC License No. NCWC 3285-A

Registered Construction Codes
02400 Tunneling, Boring, and Jacking

Registered Commodities
961 Miscellaneous Services, No. 1 (Not Otherwise Classified) 962 Miscellaneous Services, No. 2 (Not Otherwise Classified)

Company information includes:

- Contact information
- Small Business
- HUB category
- Services / License Numbers
- Registered Construction Codes
- Registered Commodities

Posting Request for Bids

- **NC Interactive Purchasing System (IPS)**
 - Certain IPS users can log in and post RFPs
 - IPS public site: <https://www.ips.state.nc.us/ips/>



HUB Office Bid Opportunities

- Anyone can submit a bid opportunity
- Minimum of 12 days before bids due (2 for posting)
- Please include the following language in your bid opportunity: ***“HUB certified contractors are encouraged to submit a bid for this project”***
- Bid Submission address: <https://ncadmin.nc.gov/businesses/historically-underutilized-businesses-hub/submit-contractor-bid-opportunity-hub>

Construction Services

Bid Number	Description	Date Issued	Bid Opening Date	Bid Opening Time	Help
SCO-17-16830-01A	DPS - Div. of Adult Correction -Nash C.I - Roof Replacement at 4 Dorms Mandatory Conf/Site Visit: 06/21/2017 A MANDATORY pre-bid meeting will be held on 06/21/2017 at 10:00am	6/5/2017	7/13/2017	02:00 PM ET	SCO-
345-17-C0820	Newbury Way Sewer Relay Mandatory Conf/Site Visit: 06/13/2017 Pre-Bid is NOT mandatory	6/1/2017	7/11/2017	11:00 AM ET	345-
SCO-16-13021-01A	DHHS-Neuro-Medical Treatment Center- ELC-1 Building Alterations A pre-bid meeting will be held on Wednesday, June 21, 2017 at 10:00am	5/25/2017	7/6/2017	02:00 PM ET	SCO-

Upcoming Events - HUB Bid Opportunities

58 upcoming events

Sunday, October 7, 2018

[Carteret County Government - Roof Replacement - Guardian Ad Litem Building - Beaufort, NC](#)

SUNDAY, OCTOBER 7, 2018
302 COURTHOUSE SQUARE
BEAUFORT, NC 218516
UNITED STATES

[Carteret County Government - Roof Replacement Old Church - Newport, NC](#)

SUNDAY, OCTOBER 7, 2018
5231 BUSINESS DRIVE
NEWPORT, NC 28570
UNITED STATES

What spending is included

NCAS Expenditure Account Codes 532XXX to 535979

<https://www.osc.nc.gov/state-agencies/chart-of-accounts/expenditure-accounts>

- Purchased Services
- Supplies
- Property, Plant & Equipment
- Other Expenses & Adjustments

Codes are likely different for Schools, Community Colleges and Universities

Examples of included spending

- Tangible goods

- Supplies
- Equipment
- Furniture
- Computers and peripherals
- Vehicles
- Medical supplies

Services

- Vehicle maintenance / cleaning
- Janitorial
- Landscaping
- Information Technology, support, installation, maintenance
- Software
- Engineering or Architecture
- Medical care (contract doctors / nurses, etc.)
- Legal

What spending is NOT included:

- Spending with governmental entities
 - Municipalities
 - State universities
 - Correction Enterprises (part of Department of Public Safety)
- Personal Services (salaries, wages, benefits, personal services payments)
- Lottery Prizes
- Aid & Public Assistance
- Reserves
- Intragovernmental Transactions



What can be reported and what cannot be reported:



- **Only vendors that are HUB Certified can be counted toward HUB spending.**
- Data entered can include purchase orders, direct pay and p-card spending.
- There is no category for Minority-Owned without a specific ethnicity category, nor is there a HUB Subcontractor option.
- If uncertain what the HUB Category for a vendor is check the HUB vendor search page at: <https://www.ips.state.nc.us/vendor/searchvendor.aspx?t=h>.

Multiple Year Contracts

- The only dollars of a multi-year contract that should be counted are those for the current fiscal year (FY 19-20)
- Dollars covering additional fiscal years should be removed from your calculations of total dollars and HUB dollars
- State Agencies should contact John Guenther if they need help about how to remove multi-year contract data (john.guenther@doa.nc.gov)

Identifying Multiple Year Contracts in e-Procurement HUB spreadsheets (State Agencies Only)

Multi Year Indicator is in Column T

- Year will be shown if Multi Year (2020, 2021, etc.)
- Purchases that are not Multi Year will show “Unspecified” in Column T

A description of the purchase should be in Column G, Line Description

G	P	T	U	AE
Line Description	Net Line Item Amount	Multi Year Indicator	Vendor Name	HUB Status
2nd Renewal - FY20 Portion - Agriculture Main &	\$24,555.00	2020	KANG'S BUILDING MAINTENANCE	Certified
2nd Renewal - FY20 Portion - Archdale Building	\$32,166.67	2020	KREATIVE KONCEPTS INC	Certified
2nd Renewal Period - FY20 Portion - MSC Routine	\$3,362.50	2020	KREATIVE KONCEPTS INC	Certified
2nd Renewal Period - FY20 Portion - CS Routine	\$3,362.50	2020	KREATIVE KONCEPTS INC	Certified
2nd Renewal Period - FY20 Portion - State Surplus	\$9,375.00	2020	KREATIVE KONCEPTS INC	Certified
Year 1 Lease agreement for Western Region office	\$1,051.59	2020	FIRC Haywood Park, LLC	None
Year 1 Lease agreement for Western Region office	\$1,051.59	2020	FIRC Haywood Park, LLC	None
Year 2 Lease agreement for Western Region office	\$5,257.95	2020	FIRC Haywood Park, LLC	None
Year 2 Lease agreement for Western Region office	\$5,257.95	2020	FIRC Haywood Park, LLC	None
Year 2 Lease agreement for Western Region office	\$1,051.59	2021	FIRC Haywood Park, LLC	None
Year 2 Lease agreement for Western Region office	\$1,051.59	2021	FIRC Haywood Park, LLC	None
Year 3 Lease agreement for Western Region office	\$5,257.95	2021	FIRC Haywood Park, LLC	None
Year 3 Lease agreement for Western Region office	\$5,257.95	2021	FIRC Haywood Park, LLC	None
Year 3 Lease agreement for Western Region office	\$1,051.59	2022	FIRC Haywood Park, LLC	None
Year 3 Lease agreement for Western Region office	\$1,051.59	2022	FIRC Haywood Park, LLC	None
7/1/19 through 6/30/20	\$2,985.24	2020	KM DATA INC	Certified
7/1/20 through 10/30/20	\$995.00	2021	KM DATA INC	Certified
7/1/19 - 6/30/20	\$2,985.24	2020	KM DATA INC	Certified
7/1/20 - 10/30/20	\$995.08	2021	KM DATA INC	Certified

Tracking Subcontractor Spending for Goods & Services

- Tracking utilization of goods & services subcontractors (2nd tier or multi-tier) is directed by Executive Order 25
- Must be able to document track and report in same way as prime vendors
 - Date of purchase
 - Type of purchase (State Term Contract, Commodity, Service)
 - Verification that subcontractors were HUB certified AT TIME OF PURCHASE
 - Identification of HUB category of subcontractors
- HUB Office e-mails a quarterly report of CAI IT Staffing subcontractor spending to state agencies and any community colleges that use the contract

Data Sources

State Agencies

- Purchase Orders – e-Procurement (except DOT and NC Education Lottery)
- P-Card Purchases – Works
- Direct Pay – NCAS Information Expert report

Community Colleges use e-Procurement and Colleague
Works for p-Card Purchases

Public Universities – systems vary
Works for p-Card Purchases

School Systems

- LINQ or SunPac (with a couple exceptions)
- Works for p-Card Purchases

Non-Profits – systems vary

- P-card – Not - applicable

Data Sources Changes coming

State Agencies

- e-Procurement will be moving to the cloud, some changes will occur, may allow for real time HUB data
- HUB Office working on shifting to actual payments from purchases order placement, less emphasis on e-Procurement, more on NCAS

Community Colleges– the Community College System Office is working on an ERP system, unknown how HUB Data / Reports will be incorporated in it.

School Systems – DPI’s School Business Systems Modernization options will include CherryRoad Technologies (Oracle Cloud ERP) and Tyler Technologies (Munis), unknown how HUB Data / Reports will be incorporated in these options.

HUB Tax ID File

STATEMENT OF RECIPIENT COMPLIANCE WITH
THE NORTH CAROLINA IDENTITY THEFT PROTECTION ACT OF 2005

_____ (“Recipient”) hereby certifies that,
pursuant to NCGS 132-1.10 (c)(1), Recipient is a governmental entity and the receipt of tax identification numbers as part of the list of certified historically underutilized businesses (pursuant to NCGS 143-48.4) from the North Carolina Office for Historically Underutilized Businesses is necessary for the performance of the Recipient’s governmental duties and responsibilities. Recipient further certifies that it shall maintain the confidential and exempt status of such tax identification information as required by Chapter 132.

By: _____
[Signature of Authorized Individual]

Name: _____
[Printed Name]

Title: _____

Date: _____

Division: _____

Submitted on behalf of the DOA by: _____
[Printed Name]

- Can be downloaded by public entities (not available to non-profits) after submitting signed Statement of Compliance
- Contains Federal Tax Ids and HUB categories of all HUB certified businesses
- Some Tax Ids are Social Security Numbers so the information needs to be maintained in a secure manner
- Downloadable (after permission granted) from a secure website, comma delimited
- Can import into LINQ and SunPac to update HUB vendor status

e-Procurement HUB Reports Summary Tab

Totals by Contract Type

HUB spending within each Contract Type

Department of Administration FY17 Q2		
Total Purchase Order Spend by Contract Type (HUB and Non-HUB)		
Contract Type	Total PO Spend	
Term Contract Purchase	\$	15,782,094.87
Commodity Purchases	\$	1,417,964.16
Service Contract Purchase	\$	13,971,429.04
Total	\$	31,171,488.07

Total HUB Spend By HUB Classification		
Contract Type	HUB Classification	Ariba HUB Spend
Term Contract Purchases	Black	\$ -
	Hispanic	\$ -
	Asian American	\$ -
	American Indian	\$ -
	Female	\$ 19,327.19
	Disadvantaged	\$ -
	Disabled-Owned	\$ -
	SubTotal	\$ 19,327.19
Commodity Purchases	Black	\$ -
	Hispanic	\$ 15,462.25
	Asian American	\$ -
	American Indian	\$ 2,175.00
	Female	\$ 50,187.32
	Disadvantaged	\$ -
	Disabled-Owned	\$ -
	SubTotal	\$ 67,824.57
Service Contract Purchase	Black	\$ 277,201.32
	Hispanic	\$ 150.00
	Asian American	\$ 279,999.11
	American Indian	\$ -
	Female	\$ 26,654.60
	Disadvantaged	\$ -
	Disabled-Owned	\$ -
	SubTotal	\$ 584,005.03

Colleague – Community Colleges

- Commodity codes matter: XHUR report depends on them to put purchases in the right categories (Term Contract, Commodity, Service Contract)
- Vendor file
 - HUB status is not automatically updated
 - Be mindful that HUB status can change (expiration, cancellation, business sold, no longer meets criteria)
- Tracking P-card spending is not currently supported in Colleague, data would come from Works

Colleague - XHUR Report



Percent of Total Spent by type of purchase:

Term Contracts, Commodities, Services

Detailed list of vouchers by HUB Category

Report Browser

1 of 2

Save As Export PDF Print Remote

Sep 06 2016 Historically Underutilized Business Report
Institution: System Office
Period: 09/01/2015-12/31/2016

	Total Spent	Percent of Total
Total Department Purchases	1412.00	
Total Term Contract Purchases		
Minority Owned		
Black		
Hispanic		
Asian American		
American Indian		
Woman Owned		
Disabled Owned		
Disabled Owned Business Enterprise		
Non-Profit Work Center For the Blind		
Socially and Economically Disadvantaged		
HUB Subcontractor		
Total Term Contract HUB Purchases	40.00	
Total Service Contract Purchases		
Minority Owned		
Black		
Hispanic		
Asian American		
American Indian		
Woman Owned		
Disabled Owned		
Disabled Owned Business Enterprise		
Non-Profit Work Center For the Blind		
Socially and Economically Disadvantaged		
HUB Subcontractor		
Total Service Contract HUB Purchases	40.00	

Report Browser

1 of 0

Save As Export PDF Print Remote

Sep 06 2016 Detailed Historically Underutilized Business Report
Institution: System Office
Period: 09/01/2015-12/31/2016

Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Minority Term Contract Purchases:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Black Term Contract Purchases:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Hispanic Term Contract Purchases:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Asian American Term Contract Purchases:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total American Indian Term Contract Purchases:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Minority Service Contract Purchases:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Black Service Contract Purchases:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Hispanic Service Contract Purchases:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost

LINQ – Purchasing Category Report

7:46:53 am

Purchasing Category Report
For: 07/01/2017 thru 03/31/2018

Purchasing Category	HUB Status	Ethnic Code	Object Code	Object Description	Amount	Amount + Taxes
N - N			000		20,170,047.88	20,170,284.04
N - N			111	Salary - Superintendent	24,463.74	24,463.74
N - N			113	Salary - Director and/or Super	291,659.64	291,659.64
N - N			114	Salary - Classified Principal/Headmaster	144,662.97	144,662.97
N - N			115	Salary - Finance Officer	15,843.03	15,843.03
N - N			116	Salary - Assistant Principal(Non-teaching)	135,640.87	135,640.87
N - N			118	Salary - Assistant Superintendent	18,600.36	18,600.36
N - N			121	Salary - Teacher	3,277,550.01	3,277,550.01
N - N			123	Salary - JROTC Teacher	19,808.82	19,808.82
N - N			124	Salary - Held Harmless Salary	7,438.40	7,438.40
N - N			131	Salary - Instruct. Support I -	339,040.64	339,040.64
N - N			132	Salary - Instruct. Support II	65,288.86	65,288.86
N - N			133	Salary - Psychologists	48,125.85	48,125.85
N - N			135	Salary - Lead Teacher	225,198.46	225,198.46
N - N			142	Salary - TA - NCLB	446,511.44	446,511.44
N - N			143	Salary - Tutor	29,129.09	29,129.09
N - N			145	Salary - Therapist	29,458.30	29,458.30
N - N			146	Salary - Specialist (School-Based)	34,737.12	34,737.12
N - N			148	Salary - Non-Certified Instruc	14,319.17	14,319.17
N - N			151	Salary - Office Support	245,697.66	245,697.66
N - N			152	Salary - Technician	62,216.62	62,216.62
N - N			153	Salary - Admin Specialist (Central Support)	6,666.35	6,666.35
N - N			162	Substitute Pay - Reg. Absence	40,205.15	40,205.15
N - N			163	Substitute Pay - Staff Dev.	5,214.99	5,214.99
N - N			164	Substitute Pay - Non-Teaching	3,132.51	3,132.51
N - N			167	Subst. Pay - Reg. Absence	141.91	141.91
N - N			171	Salary - Driver	1,129.21	1,129.21
N - N			173	Salary - Custodian	112,838.74	112,838.74
N - N			174	Salary - Cafeteria Workers	50,901.48	50,901.48
N - N			175	Salary - Skilled Trades	134,015.58	134,015.58
N - N			176	Salary - Manager	32,134.98	32,134.98
N - N			177	Work Study Student	101.21	101.21
N - N			180	Bonus Pay (Not Subject to Retirement)	48,184.26	48,184.26
N - N			181	Supplementary Pay	52,723.34	52,723.34
N - N			184	Longevity Pay	16,631.31	16,631.31
N - N			185	Bonus Leave Payoff	1,698.39	1,698.39
N - N			186	Short Term Disability - Beyond 6 Months	3,349.18	3,349.18
N - N			187	Salary Differential	11,025.17	11,025.17
N - N			188	Annual Leave Payoff	12,041.73	12,041.73
N - N			189	Short Term Disability - First Six Months	1,728.79	1,728.79
N - N			191	Curriculum Development Pay	1,164.02	1,164.02

7:46:53 am

Purchasing Category Report
For: 07/01/2017 thru 03/31/2018

Purchasing Category	HUB Status	Ethnic Code	Object Code	Object Description	Amount	Amount + Taxes
N - N			373	Insurance - Property	2,166.10	2,166.10
N - N			375	Fidelity Bond Premium	660.00	660.00
N - N			378	Scholastic Accident Insurance	20,950.00	20,950.00
N - N			379	Other Insurance & Judgments	17,191.50	17,191.50
N - N			411	Supplies and Materials	734,825.03	770,130.55
N - N			413	Other Textbooks	135,884.74	147,783.36
N - N			414	Library Books	122,603.29	133,089.62
N - N			418	Computer Software and Supplies	258,230.51	280,248.74
N - N			422	Repair Parts, Materials & Labor	223,314.01	235,535.40
N - N			423	Gas/Diesel Fuel	48,901.54	48,901.54
N - N			451	Food Purchase	464,767.88	464,779.11
N - N			453	Food Processing Supplies	42,939.59	44,022.35
N - N			458	Other Food Purchases	11,221.95	11,621.18
N - N			461	Furniture and Equipment - Inve	28,688.52	30,007.43
N - N			462	Computer Equipment - Inventori	44,557.44	47,509.01
N - N			522	General Contract	343,452.49	313,786.58
N - N			526	Architects Fees	37,168.06	37,168.06
N - N			529	Miscellaneous Contracts & Othe	183,707.24	151,882.33
N - N			532	Improvements to Existing Sites	16,550.00	19,351.00
N - N			541	Equipment Purchase - Capitaliz	267,562.19	286,319.62
N - N			542	Computer Hardware Purchase - Cap.	521,366.13	554,212.21
N - N			551	Vehicles Purchase	39,662.42	39,662.42
N - N			552	License and Title Fees	703.00	703.00
N - N			715	Tfrs to Multiple Enterprise Fund	718.00	768.27
N - N			716	Tfrs to Individual School Fund	143,000.00	143,000.00
N - N			717	Tfrs to Charter Schools	747,322.04	747,322.04
N - N Total:					40,899,157.31	40,994,472.62
MBE - Minority Business Enterprise	Active	AA	411	Supplies and Materials	2,494.65	2,635.67
MBE - Minority Business Enterprise	Active	B	311	Contracted Services	30,000.00	30,000.00
MBE - Minority Business Enterprise	Active	B	411	Supplies and Materials	339.60	363.37
MBE - Minority Business Enterprise	Active	B	522	General Contract	711,873.25	711,873.25
MBE - Minority Business Enterprise Total:					744,707.50	744,872.29
WBE - Woman Business Enterprise	Active		311	Contracted Services	5,471.00	5,471.00
WBE - Woman Business Enterprise	Active		312	Workshop Exp/Allowable Travel	638.09	682.76
WBE - Woman Business Enterprise	Active		319	Other Professional/Technical S	18.78	20.09
WBE - Woman Business Enterprise	Active		325	Contracted Repairs - Land/Bldg	3,262.50	3,262.50
WBE - Woman Business Enterprise	Active		411	Supplies and Materials	56,137.01	60,482.55
WBE - Woman Business Enterprise	Active		461	Furniture and Equipment - Inve	252.88	270.58
WBE - Woman Business Enterprise	Active		462	Computer Equipment - Inventori	949.33	1,015.78

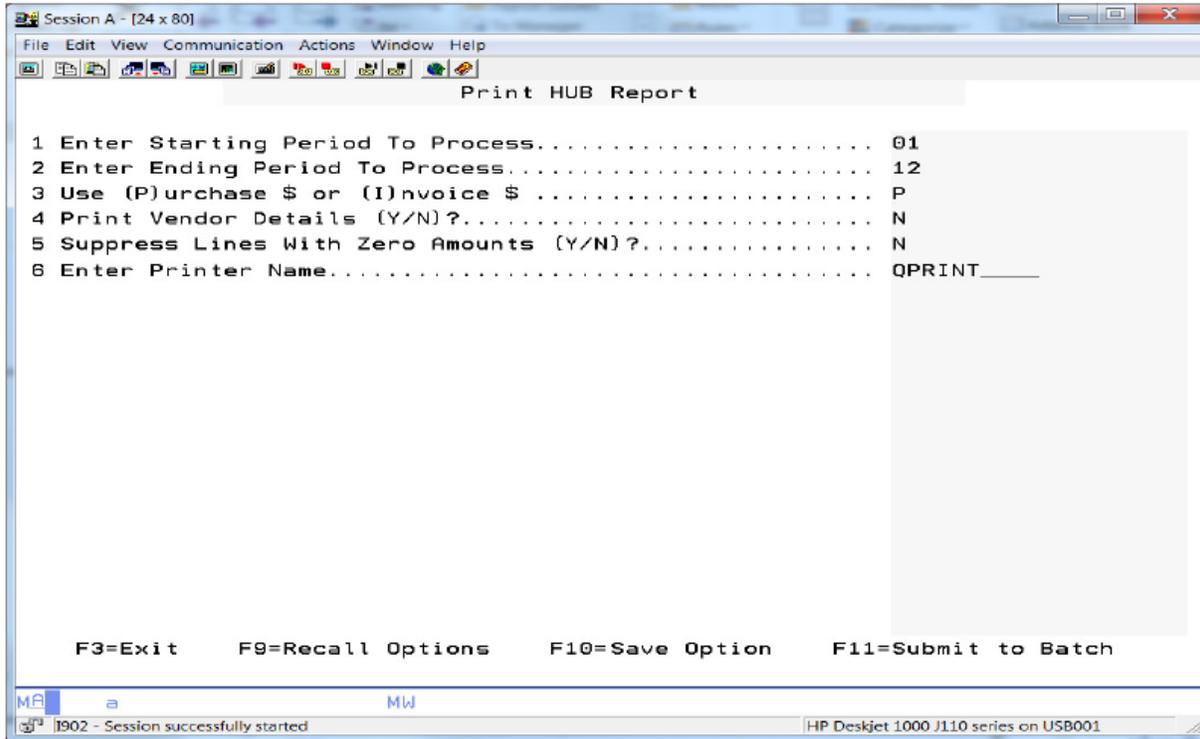
Benefits, leave and salaries do not count toward purchases of goods and services.

LINQ requires upload of HUB Tax ID info to update HUB Status and Ethnic Code.
LINQ does not automatically break out by Term Contract, Commodity or Service.

SunPac

PO Menu - #31 HUB Report

This option will produce a report that you will then use to enter the necessary values into the on-line HUB worksheet. You will be keying only the dollar amounts. Percentages are for historical reference only.



- SunPac – HUB Report instruction document is available.
- Recommend reporting based on Invoices rather than Purchases.

RUN: 3/17/16 14:44 *** HUB PURCHASE REPORT *** PAGE: 1

Description	Amount	% of all Purchases	% of Cat Purchases	% of HUB Purchases

Total Entity Purchases For Prds: 01-12	2,879,084			
Total Term Contract Purchases	566,024	19.65		
Minority - Black	46,695	1.62	8.24	24.64
Minority - Hispanic	16,444	0.57	2.90	8.68
Minority - Asian American	57,010	1.98	10.07	30.09
Minority - American Indian	2,542	0.08	0.44	1.34
Women Owned	11,936	0.41	2.10	6.30
Disabled Owned Business	20,767	0.72	3.66	10.96
Disabled Business Enterprise	5,482	0.19	0.96	2.89
Non-Profit Work Center	4,989	0.17	0.88	2.63
Socially & Economically Disadvantaged	23,568	0.81	4.16	12.44
Total Term Contract HUB Purchases	189,437	6.57	33.46	
Total Commodity Purchases	593,295	20.60		
Minority - Black	31,369	1.08	5.28	13.87
Minority - Hispanic	69,189	2.40	11.66	30.60
Minority - Asian American	56,911	1.97	9.59	25.17
Minority - American Indian	13,825	0.48	2.33	6.11
Women Owned	4,640	0.16	0.78	2.05
Disabled Owned Business	8,268	0.28	1.39	3.65
Disabled Business Enterprise	1,887	0.06	0.31	0.83
Non-Profit Work Center	10,887	0.37	1.83	4.81
Socially & Economically Disadvantaged	29,096	1.01	4.90	12.87
Total Commodity HUB Purchases	226,075	7.85	38.10	

- SunPac has ability to upload HUB Tax ID info to update HUB Status and Ethnic Code.
- Report Layout very similar to IPS HUB report.

Non-Profits



- Non-Profit reports are assigned to the Support Agencies category
- Non-Profits will only report on General Assembly appropriation amount
- Report on Commodities and Services, but not State Term Contracts

IPS Data Entry Basic Steps

- 1) Log in
- 2) Click on “Quarterly HUB Information”:
- 3) Click on the Notepad /pencil icon of the report you want to work on.
- 4) Enter all purchase totals for:
 - Term contract purchases (HUB & Non HUB)
 - Commodity Purchases (HUB & Non HUB)
 - Service Purchases (HUB & Non HUB)
- 5) Enter all HUB purchases by HUB category (rounding to the nearest dollar)
- 6) Make sure there are no dollar signs or periods.
- 7) Click **Next** →, at the bottom of the screen.
- 8) Review dollar values on Review/Approve screen and click Back, Approve or Cancel.

[Instructions for Reporting using the HUB Procurement Report](#)

IPS login:

<https://www.ips.state.nc.us/ips/Agency/Logon.aspx>



State of North Carolina
Interactive Purchasing System

IPS Logon

IPS Login

Enter UserId and Password to continue...

UserId:

Password:

[Forgot/Change Password](#)

After Login

Click on Quarterly
HUB Information

IPS
interactive purchasing system

Choose Location

Inbox
Search Options
Search QA Inspections
Search for Registered Vendor
Search for Agency Bid

Enter Requisitions
Reuse Requisition
Cancel Requisition

Post Bid
Post Design/Construction
Post Addenda
Bids Under Review
Search for Bids
Enter Price Match Award
Search for Price Match Award
Create Report/Excel Spreadsheet

HUB Procurement Reporting

 Quarterly HUB Information
 Agency HUB Procurement List

Your Inbox Is Empty



IPS HUB Procurement Reporting Screen



- Each Quarter will have its own row and link. FY 19-20 reports should be on Page 2
- Current reporting quarter will be at the bottom
 - Status will be “Pending” until you Approve the report
 - Status will be “Submitted” once report is Approved
- Click on the notepad and pencil icon to EDIT the appropriate report
- View only option is available as well (use this if you do not need to make changes)

[12](#)

View	Edit	Agency	Fiscal Year	Quarter	Status
		CC - Wake Technical Community College	2015 - 2016	1st - July 1 - Sept 30	Submitted
		CC - Wake Technical Community College	2015 - 2016	2nd - Oct 1 - Dec 31	Submitted
		CC - Wake Technical Community College	2015 - 2016	3rd - Jan 1 - Mar 31	Submitted
		CC - Wake Technical Community College	2015 - 2016	4th - Apr 1 - June 30	Submitted
		CC - Wake Technical Community College	2016 - 2017	1st - July 1 - Sept 30	Submitted
		CC - Wake Technical Community College	2016 - 2017	2nd - Oct 1 - Dec 31	Submitted
		CC - Wake Technical Community College	2016 - 2017	3rd - Jan 1 - Mar 31	Submitted
		CC - Wake Technical Community College	2016 - 2017	4th - Apr 1 - June 30	Submitted
		CC - Wake Technical Community College	2017 - 2018	1st - July 1 - Sept 30	Submitted
		CC - Wake Technical Community College	2017 - 2018	2nd - Oct 1 - Dec 31	Submitted
		CC - Wake Technical Community College	2017 - 2018	3rd - Jan 1 - Mar 31	Submitted
		CC - Wake Technical Community College	2017 - 2018	4th - Apr 1 - June 30	Submitted
		CC - Wake Technical Community College	2018 - 2019	1st - July 1 - Sept 30	Submitted
		CC - Wake Technical Community College	2018 - 2019	2nd - Oct 1 - Dec 31	Submitted
		CC - Wake Technical Community College	2018 - 2019	3rd - Jan 1 - Mar 31	Submitted

Term Contract Purchases(HUB & Non-HUB)		1500
Term Contract Purchases(HUB)		
Black		50
Hispanic		0
Asian American		0
American Indian		0
Female		0
Disabled Owned		0
Disabled Business Enterprise		0
Non-Profit Work Center		0
Socially and Economically Disadvantaged		0
Commodity Purchases(HUB & Non-HUB)		0
Commodity Purchases(HUB)		
Black		0
Hispanic		0
Asian American		0
American Indian		0
Female		0
Disabled Owned		0
Disabled Business Enterprise		0
Non-Profit Work Center		0
Socially and Economically Disadvantaged		0
Service Purchases(HUB & Non-HUB)		0
Service Purchases(HUB)		
Black		0
Hispanic		0
Asian American		0
American Indian		0
Female		0
Disabled Owned		0
Disabled Business Enterprise		0

Data Entry Screen

Enter Totals (HUB and Non-HUB) in blue rows for types of purchases:

- Term Contract Purchases (can be commodities or services)
- Commodity Purchases (not on state term contract)
- Service Purchases (not state term contract)

Enter \$ for each HUB category by type of purchase:

- Black
- Hispanic
- Asian American
- American Indian
- Female
- Disabled
- Disabled Business Enterprise
- Non-Profit Work Center
- Socially & Economically Disadvantaged

Agency	UNIVERSITY - UNC at Pembroke	
Fiscal Year	2017 - 2018	
Quarter	3rd - Jan 1 - Mar 31	
Total All Purchases(HUB & Non-HUB)	\$755,000	% of Total All Purchases
Term Contract Purchases(HUB & Non-HUB)	\$5,000	0.66%
Black	\$250	0.03%
Hispanic	\$0	0.00%
Asian American	\$0	0.00%
American Indian	\$0	0.00%
Female	\$1,500	0.20%
Disabled Owned	\$0	0.00%
Disabled Business Enterprise	\$0	0.00%
Non-Profit Work Center	\$0	0.00%
Socially and Economically Disadvantaged	\$0	0.00%
Term Contract Purchases(HUB)	\$1,750	0.23%
Commodity Purchases(HUB & Non-HUB)	\$150,000	19.87%
Black	\$7,000	0.93%
Hispanic	\$1,500	0.20%
Asian American	\$0	0.00%
American Indian	\$0	0.00%
Female	\$14,000	1.85%
Disabled Owned	\$5,000	0.66%
Disabled Business Enterprise	\$0	0.00%
Non-Profit Work Center	\$0	0.00%
Socially and Economically Disadvantaged	\$0	0.00%
Commodity Purchases(HUB)	\$27,500	3.64%

Service Purchases(HUB & Non-HUB)	\$600,000	79.47%
Black	\$3,000	0.40%
Hispanic	\$20,000	2.65%
Asian American	\$4,500	0.60%
American Indian	\$0	0.00%
Female	\$15,000	1.99%
Disabled Owned	\$0	0.00%
Disabled Business Enterprise	\$0	0.00%
Non-Profit Work Center	\$0	0.00%
Socially and Economically Disadvantaged	\$0	0.00%
Service Purchases(HUB)	\$42,500	5.63%
Total Purchases(HUB & Non-HUB)	\$755,000	
Black	\$10,250	1.36%
Hispanic	\$21,500	2.85%
Asian American	\$4,500	0.60%
American Indian	\$0	0.00%
Female	\$30,500	4.04%
Disabled Owned	\$5,000	0.66%
Disabled Business Enterprise	\$0	0.00%
Non-Profit Work Center	\$0	0.00%
Socially and Economically Disadvantaged	\$0	0.00%
Total Purchases(HUB)	\$11,750	9.50%
By clicking on Approve I am certifying on behalf of my agency, school, university or college that the information provided in this report is complete and accurate. Audit Notice: All reported information submitted to the Office for Historically Underutilized Businesses is subject to audit and review.		
<input type="button" value=" <-- Back"/> <input type="button" value=" Approve"/> <input type="button" value=" Cancel"/>		

Review and Approval Screen

- Click Back to go back to edit
- Click Approve to submit report.
- Click Cancel save data and leave report.

Tips

- Whole numbers only
- Do NOT enter \$ symbol or periods
- Negative numbers in HUB fields can be used to reflect when change orders decrease the value of a contract.
 - IPS gets confused by negatives in the Total HUB and Non-HUB fields
 - Contact the HUB Office if this you encounter this situation
- To move between fields use the Tab button or click on a field with your cursor.
 - Hitting ENTER stops the data entry and moves you to the next screen for review and approval.
- Edits: Quarters already submitted can be edited if additional information is available (We are rethinking this option due to inadvertent mistakes with prior quarters.

Caution

- Once you hit “Approve” the report is considered officially submitted and is added to the aggregate totals.
- **Use the View option if you need to see what you have entered and approved, (look for the open book icon)**
- If you select the Edit option (pencil and paper icon) after hitting Approve, the report status switches back to “Pending”
 - IPS thinks you are changing numbers and will not count the values entered until you hit Approve again.

Entity Reports

Click on Agency HUB Procurement List



In
In



- Choose Location
-
- Inbox**
- Search Options
- Search QA Inspections
- Search for Registered Vendor
- Search for Agency Bid
-
- Enter Requisitions
- Reuse Requisition
- Cancel Requisition
-
-
-
- Post Bid**
- Post Design/Construction
- Post Addenda
- Bids Under Review
- Search for Bids
- Enter Price Match Award
- Search for Price Match Award
- Create Report/Excel Spreadsheet
- HUB Procurement Reporting
- Quarterly HUB Information
- Agency HUB Procurement List

Your Inbox Is Empty

Agency HUB Procurement List



State of North Carolina Statewide Uniform Certification System Agency HUB Procurement List

Agency: Status:

Fiscal Year: Quarter:

HUB Agency Group:

Select the Fiscal Year

Select All (default) or a specific Quarter

Select All (default), Pending or Submitted

- Pending is not counted toward HUB participation
- Submitted is counted toward HUB participation

Agency HUB Procurement List Results

Change Search New Search Create Excel Spreadsheet

Total of 2 records found

	<u>Agency</u>	<u>HUB Agency Group</u>	<u>Fiscal Year</u>	<u>Quarter</u>	<u>Status</u>
	UNIVERSITY - UNC at Pembroke	State Universities	2017 - 2018	1st - July 1 - Sept 30	Submitted
	UNIVERSITY - UNC at Pembroke	State Universities	2017 - 2018	3rd - Jan 1 - Mar 31	Submitted

Example results show only Q1 and Q3 as Submitted, Q2 as Pending

Clicking on Create Excel Spreadsheet allows for download of all data entered

- TC = State Term Contract
- Com = Commodities
- Ser = Services

A	B	C	D	E	F	G	H
Department	Agency Group	Quarter	Fiscal Year	Total TC	TC Black	TC Hisp	TC AA
UNIVERSITY - UNC at Pembroke	State Universities	1	2017 - 2018	\$33,071	\$0	\$0	
UNIVERSITY - UNC at Pembroke	State Universities	3	2017 - 2018	\$5,000	\$250	\$0	

Additional Resources

- HUB Business Resources Links
 - <https://ncadmin.nc.gov/businesses/historically-underutilized-businesses-hub/hub-business-resource-links>
 - List of Minority Media outlets / newspapers
 - List of Minority Construction Contractor Organizations

What you learned today:



Overview of NC HUB Office

Definition of a Historically Underutilized Business

How to find HUBs

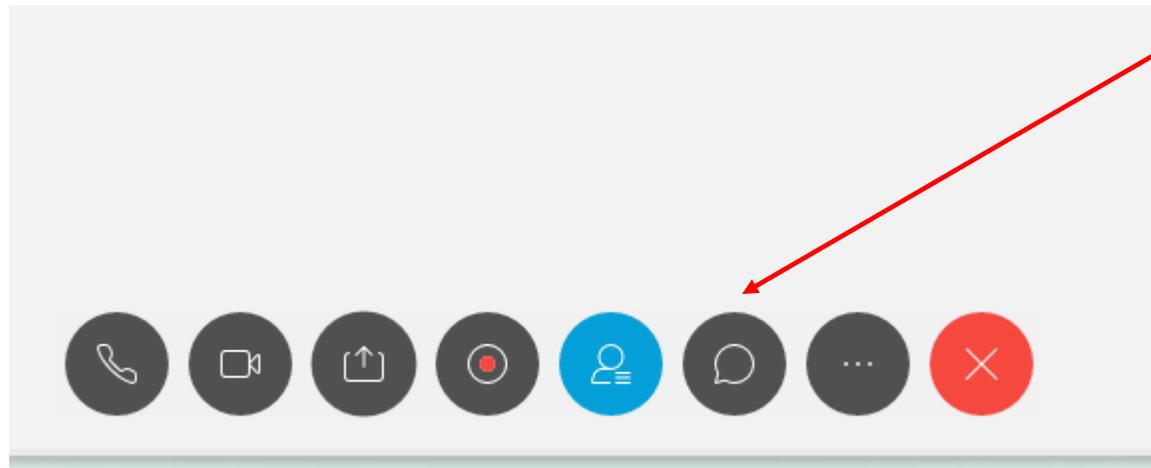
Who is required to report on purchases of goods & services

When reports are due

How to report in IPS

Questions?

Did you add your name, organization and county in the chat box for attendance?



Contact Information

- HUB Office

- Website: <https://ncadmin.nc.gov/businesses/hub>
- Main Office Phone: 919-807-2330
- Email: HUBOffice.DOA@doa.nc.gov

- John Guenther, Compliance Officer

- 919-807-2436
- John.Guenther@doa.nc.gov



Thank you for participating.

