



North Carolina
Department of Administration

Machelle Sanders
Secretary

Marqueta Welton
Deputy Secretary of Service Operations

July 12, 2018

MEMORANDUM

TO: All Deputy Secretaries and Chief Financial Officers
State Agencies, Institutions, Community Colleges and Universities

FROM: Marqueta Welton

SUBJECT: Statewide Procurement Planning (FY 2019)

RE: § 143-51. Reports to Secretary required of all agencies as to needs and purchases

The mission of Purchase and Contract (P&C) is to provide for the economical acquisition of goods and services for the State of North Carolina. The P&C Division typically makes this provision through the employment of strategic sourcing methods that result in volume discounts in statewide term contracts.

Most of the information used to identify necessary contracts is gained through anecdotal sources, which rarely provide enough information to make adequate sourcing decisions. To be more fact-based, data-driven and strategic in the development of sourcing plans, the P&C Division is launching a Procurement Planning tool. The purpose of the tool is simply to gather high level procurement needs from all users, which will be aggregated and analyzed to determine the best procurement approach for each good or service identified. Some potential approaches include, but are not limited to, Statewide Term Contracts, Agency Term Contracts, Spot Buys, Cooperative/Partnership Agreements or Reverse Auctions.

The Procurement Planning Tool is very simple to complete; however, instructions, FAQs, and a [micro-burst training session](#) are provided. As P&C is seeking a comprehensive summary of your entity's needs, please consult with your agency's subdivisions to submit one report for your agency for the period July 1, 2018 through June 30, 2019. The following link connects you to the planning tool.

[Procurement Planning FY19](#)

Reports are due by September 30, 2018. P&C will aggregate the data and develop sourcing plans to acquire the goods and services identified. They will also provide a comprehensive snapshot by agency for your review, if requested.

For your reference, the statute that authorizes this effort follows:

RE: § 143-51. Reports to Secretary required of all agencies as to needs and purchases

(a) It shall be the duty of all departments, institutions, or agencies of the State government to furnish to the Secretary of Administration when requested, and on forms to be prescribed by him, estimates of all goods and services needed and required by such department, institution or agency for such periods in advance as may be designated by the Secretary of Administration.

(b) In addition to the report required by subsection (a) of this section, all departments, institutions, or agencies of the State government shall furnish to the Secretary of Administration when requested, and on forms to be prescribed by him, actual expenditures for all goods and services needed and required by the department,

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institution, or agency for such periods after the expenditures have been made as may be designated by the Secretary of Administration.

P&C is committed to adding value through the implementation of strategic actions and operations. Planning for procurements (rather than reacting to requests) is the first step in the State's transition *from transactional to strategic* procurement. Beyond being strategic, planning for success is simply *good business*.

Thank you for your support. If you have additional questions, please contact Odessa McGlown at (919) 807-4500.