

Consolidated Purchasing Workgroup -9/16/2010

Discussion of Campus Purchasing Exception Process for WCU

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 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

It is recommended that all computer purchases within the criteria of the program use the standard configurations to the extent possible. This procedure governs all computer purchases. 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.

Process

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

Standard Configurations:

Standard configurations will be presented to Purchasing for processing without further approval.

Minor variations to Standard Configurations:

Purchases of configurations that conform to the standards but including options not on the approved options list would require approval by the appropriate Budgetary Officer or designee. The computer order will then be presented to the Purchasing Office for approval and final processing. Minor variations include non-standard items such as floppy drives, Zip drives, parallel or serial cards and other legacy peripherals.

Non-Standard Configurations:

Configurations and options outside of the standard options will require approval by the University Computer Exception Committee. This includes other computer brands or other Dell models not on the approved list. Submission for exception requires prior approval by the Department Head and appropriate College Dean or Executive Council member. The University committee membership will consist of a Division of IT representative (chair), a Purchasing representative, an academic representative appointed by the Provost, and other representatives if the CIO deems it prudent. The requester should submit a request for exception in writing using the Non-Standard Computer Exception Request Form to the chair of the committee one week prior to the next scheduled meeting. It is desirable for the requester to be present at the monthly committee meeting. The Dell Market Place workflow is expected to have an approval by both the Purchasing Office and the University committee in addition to the existing financial approvals.

Criteria for Approval

- Required for critical work functions
- Specific hardware and software vendor requirements
- Usage process requirements

Reporting

Under the guidelines from the UNC-System and the General Assembly, WCU 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. Exceptions for WCU initially may not exceed 20%, with a planned reduction to 5%.