

January 2022

Historically Underutilized Businesses Reporting on HUB Purchases of Goods & Services

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Please type in your Full Name and Organization Name in the Chat for attendance purposes.

This webinar will be recorded.

Questions we will answer in this training:

1. What is a HUB?
2. Why do we have to look for HUB vendors?
3. Who is required to report and when are reports due?
4. What is reported?
5. How do we report our HUB spend?
6. How do we find or verify HUB vendors?



State Policy encourages the use of Historically Underutilized Businesses in purchases 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



Two Types

Purchasing of Goods and Services (covered by this webinar)

Reporting System: Interactive Purchasing System (IPS)

Construction spending (NOT covered in this webinar)

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



The main roles of the HUB Office include:

- HUB Certification
- NC Small Business Enterprise Certification
- Support the use of Historically Underutilized Businesses and NCSBEs
- Business Development services to HUBs/NCSBEs
- Providing training to HUB vendors and the state and local governments
- Collecting reports on construction spending and goods/services purchases





What is a HUB?

Definition of Historically Underutilized Business



Per NC General Statute 143-128.4 to be a HUB requires:

- 51% ownership and daily management / control by individuals in HUB Certification categories



HUB Certification Categories

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

Self identified categories (not certified) – Goods & Services only:

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

\$ captured per NC General Statute 143-48

HUB Certification Process



Statewide Uniform Certification (SWUC) = HUB certification

- Certification lasts for 4 years
- Optional recertification every 4 years
- Takes about 45-90 days to get certified
- There is no fee to be certified
- Reciprocity options exist, making it easier to get HUB certified if a firm is already certified:
 - Georgia ,North Carolina, South Carolina, Tennessee, Virginia
 - NC DOT DBE (has its own reciprocity application)
 - US SBA 8(a) or Woman Owned Small Business
 - US Dept of Veteran's Affairs Service-Disabled Veteran-Owned Small Business
 - National Minority Supplier Development Council (NMSDC)
 - Women's Business Enterprise National Council (WBENC)



How do HUBs get Certified?



1. Register in eVP (NC electronic Vendor Portal)

- Firms need to register for both IPS and HUB
- E-Procurement registration is optional

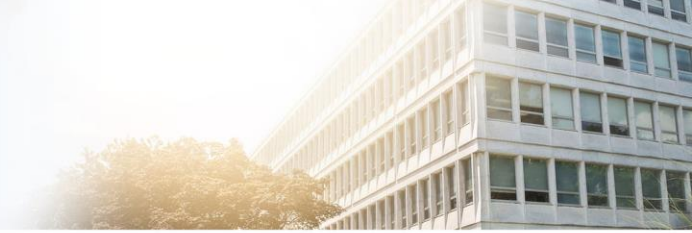
<https://vendor.ncgov.com/vendor/login>

2. Submit completed and signed Statewide Uniform Certification Application

<https://files.nc.gov/ncdoa/documents/files/SWUC-Application-Revised-01.07.21.pdf>

3. Submit required documents

<https://files.nc.gov/ncdoa/New%20Certification%20Required%20Documents%20-final.pdf>



Why do HUBs need to be certified?

- According to NC General Statute [143-128.4 \(e\)](#):

“Only businesses certified in accordance with this section shall be considered by State departments, agencies, and institutions, and political subdivisions of the State as historically underutilized businesses for minority business participation purposes under this Chapter.”

- Some support programs are only available to certified HUBs.



How do firms get help with HUB certification?

- They can watch the certification training webinar available at:
<https://www.youtube.com/watch?v=W4U8hbG7bVE>
- They can contact the HUB Office
 - Phone: 984-236-0130
 - huboffice.doa@doa.nc.gov



North Carolina Small Business Enterprise Certification Criteria

Governor Roy Cooper issued Executive Order 143 to support and address the impacts of COVID-19 on Small Historically Underutilized businesses. The HUB Office was charged with creating a Small Business Enterprise (NCSBE) program. NCSBE is a race / ethnicity / gender neutral program.

Criteria

- For Profit business headquartered in North Carolina.
- The firm has an annual net income of not more than \$1,500,000, after cost of Goods Sold is deducted.
- The firm must have 100 or fewer employees.





NCSBE Certification Process

HUB FIRM: Active HUB certified firms, **that meet NCSBE standards**, can be certified as a NCSBE vendor with the submission of an [affirmation letter](https://files.nc.gov/ncdoa/documents/files/NCSBE-Affirmation-Letter-02.17.2021.pdf):
<https://files.nc.gov/ncdoa/documents/files/NCSBE-Affirmation-Letter-02.17.2021.pdf>.

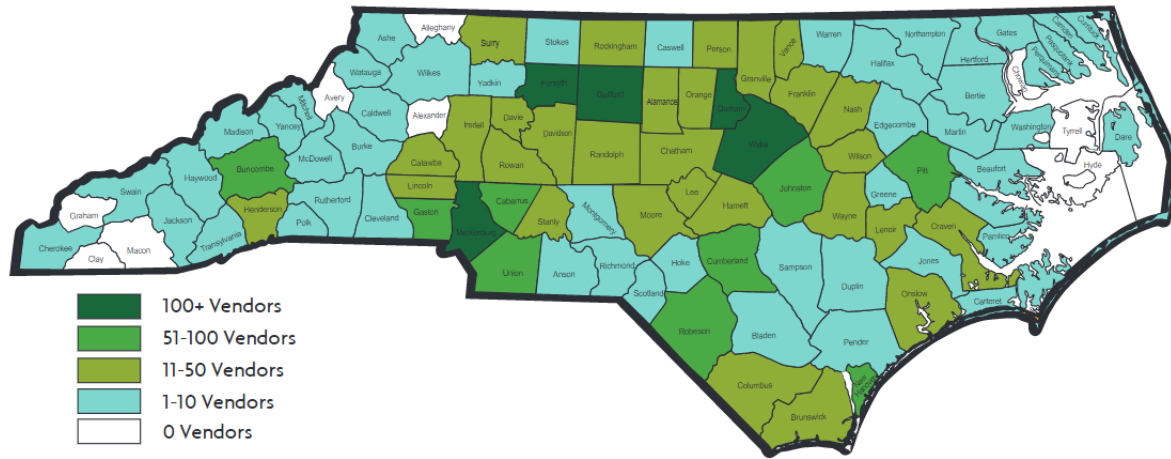
NON-HUB FIRM: A firm that is **not** HUB certified can apply for NCSBE certification by submitting...

- the [NCSBE application](https://files.nc.gov/ncdoa/documents/files/NCSBE-Application-revised-061721_Fillable.pdf) https://files.nc.gov/ncdoa/documents/files/NCSBE-Application-revised-061721_Fillable.pdf
- and [required documents](https://files.nc.gov/ncdoa/documents/files/NCSBE-Required-Documents-0821.pdf) <https://files.nc.gov/ncdoa/documents/files/NCSBE-Required-Documents-0821.pdf>

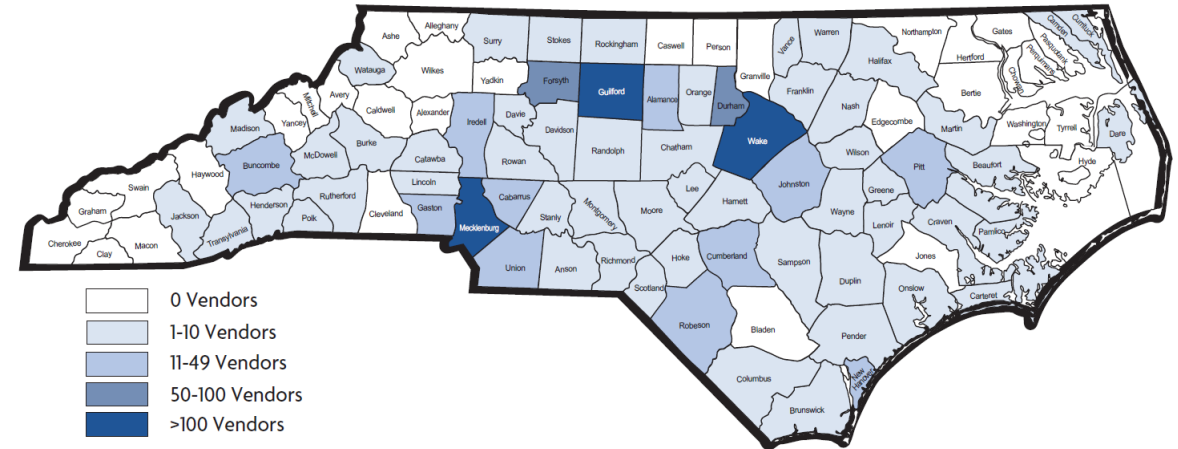


Vendors in North Carolina

HUB Certifications in North Carolina (October, 2021)



North Carolina Certified Small Business Enterprises by County



Total HUB Certified Vendors as of January 20, 2021: 5,707
 # certified or recertified since July 1, 2021: 1,022
 Average of 146 certifications per month.

Total Certified NCSBEs as January 20, 2022 : 1,805
 # certified or recertified since July 1, 2021 : 351

HUB Vendor Search (can look for HUBs that are also NCSBE):

<https://www.ips.state.nc.us/vendor/searchvendor.aspx?t=h>

NCSBEs (HUB & non-HUB) can be found using the IPS
 Search for Vendor Information:

<https://www.ips.state.nc.us/vendor/searchvendor.aspx>



Why do we have to look for HUB vendors?

Why do we have to look for HUB vendors?



As stated in Governor Cooper's [Executive Order Number 25](#) and expressed similarly in Executive Orders by prior Governors:

“it is vital that all North Carolinians have an opportunity to contribute economically by participating in business opportunities existing in government”

And... “the utilization of historically underutilized businesses (“HUBs”) is critical to creating a vibrant, sustainable, and diverse business community in the State of North Carolina”

Per NC General Statute [143-48](#) “It is the policy of this State to encourage and promote the use of small contractors, minority contractors, physically handicapped contractors and women contractors” for goods and services.

Why does NCSBE certification matter?

Executive Order 143 is titled “Addressing the Disproportionate Impact of COVID-19 on Communities of Color” and it...

- Directs the HUB Office to create the North Carolina Small Business Enterprise Program(NCSBE) and certify firms that meet size criteria and...
- Requires bids on projects \$250,000 or below from certified small HUBs or seek an exception from the Secretary of the Department of Administration.
 - NCSBE = “certified small”
 - Goods and Services Exemption Requests managed by Division of Purchase and Contract

- [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

2021 Disparity Study Report

“The Study was to determine whether the State, either in the past or currently, engages in exclusionary practices in the solicitation and award of contracts to minority and women owned businesses (MWBE).”

Included data from 29 state agencies, 58 community colleges and 21 public universities / institutions for 4 fiscal years.

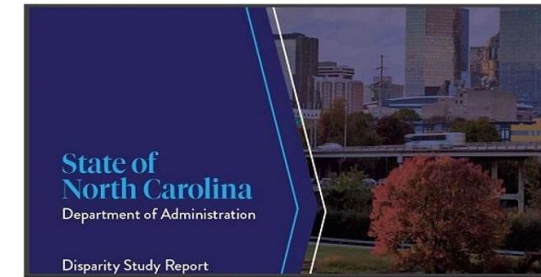
Industry Categories: Reviewed included: Construction, Architectural & Engineering (A&E), Professional Services, Other Services, Goods

A regression analysis found that disparities by race, ethnicity, or gender status of the firm owners remained after controlling for capacity and other race and gender-neutral factors.

12 Recommendations were made to help improve use of HUB vendors by public entities in North Carolina. Recommendations range from strengthening the HUB Program, instituting subcontracting goals, establishing a small business reserve program, supportive services and data reform.

Disparity Study Report can be found at:

<https://ncadmin.nc.gov/businesses/historically-underutilized-businesses-hub/disparity-study-report>



- Goal of 10% set in Executive Order 25
- Spending reported to the HUB Office on a quarterly basis
- State Agencies, Community Colleges, Public Universities, School Systems

FY 20-21 Purchases of Goods and Services*

Total Spending: **\$9,941,836,415**

Spending with HUBs: **\$638,546,538**

% Spending with HUBs: **6.42%**

Highest HUB % since FY 10-11.

Highest HUB \$ ever reported for
Goods and Services spending.

***Only Certified HUBs count toward HUB \$ and HUB %**



Who is required to report and when are reports due?



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

HUB Purchasing of Goods & Services Expenditure Reporting

Reporting Periods

Period	Dates Covered	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

Due dates can be found on the HUB Office website at:

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

Reminders of the reporting due dates are sent by e-mail each quarter.

Purchases of Goods & Services FY 21-22 as of January 20, 2022

Agency Category	Total(\$)	HUB(\$)	HUB(%)
Cabinet Agencies	\$895,428,823	\$49,468,623	5.52%
Community Colleges	\$260,801,742	\$28,954,800	11.10%
Council of State	\$77,534,179	\$1,830,476	2.36%
Public Schools	\$1,140,554,311	\$118,536,286	10.39%
State Universities	\$917,178,581	\$20,436,024	2.23%
Supporting Agencies	\$153,624,018	\$27,388,861	17.83%
Total	\$3,445,121,654	\$246,615,070	7.16%

101 of 226 entities have reported so far for FY 21-22 Q2

- 4 state agencies
- 2 Non-Profit
- 32 Community Colleges
- 60 School Systems
- 3 Universities



What is reported?

What is reported?



What is reported:

- Term contracts (State Term Contracts)
- Open market purchases
- Non-governmental entities
- Actual payments

How purchases are made:

- Purchase Order payments
- Direct payments
- P-card payments

State Term Contracts can be found on the NC P&C website: <https://ncadmin.nc.gov/government-agencies/procurement/statewide-term-contracts>. Vendors that are HUB certified are identified on the list.



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

Vendors that are HUB certified are identified on the list.

State Term Contracts with HUB vendors include:

- HVAC Air Filters
- Condoms
- Diesel
- Durable Medical Equipment
- Microscopes
- Office Supplies
- Veterinary Supplies & Equipment
- Supplemental Internal Auditing Services
- Pharmaceutical Returned Goods Processing

Example of Included Goods and Services Spending (not Term Contract)

Commodities = Tangible goods

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

Services

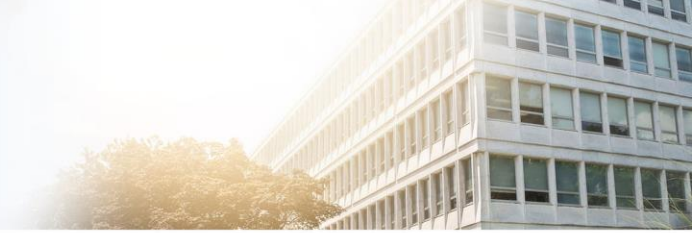
- Vehicle maintenance / cleaning
- Janitorial
- Landscaping
- Information Technology, support, installation, maintenance
- Software
- Medical care (contract doctors / nurses, etc.)
- Legal

What spending is NOT included:

Do NOT Count:

- Spending with governmental entities as vendors (if any of these show up as vendors in your reports you need to exclude the spending from your totals)
 - Municipalities
 - State universities or community colleges
 - Counties
 - Sheriff Departments / Local Jails
 - Correction Enterprises (part of Department of Public Safety)
 - Vendors mandated by General Assembly or other rule
- Personal Services (salaries, wages, benefits, personal services payments)
- Lottery Prizes
- Aid & Public Assistance
- Reserves
- Intragovernmental Transactions

NCAS Expenditure Account Codes



- HUB Spending Report System (HUB SRS) uses NC Accounting System's (NCAS) Expenditure Account codes to identify what can be counted and what should be excluded.
- Disparity Study group consulted on additional codes to exclude.
 - 225 codes were identified for exclusion (they are already being excluded from HUB SRS Q2 data)
 - Exclusions include workshop / conference expenses and registration fees, some hospital provided services, rent/lease agreements, electrical services / water & sewer, internet service provider charges, cable TV, inmate tuition, prescription drugs, legal settlements, court costs, pension fund payments, amortization, debt service payments
 - See list sent with this presentation
- HUB Office will provide list of codes to count and exclude so non-HUB SRS using agencies can use it to guide what they report.

Tracking Subcontractor Spending for Goods & Services



- Tracking utilization of goods & services subcontractors (2nd tier or multi-tier 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 PAYMENT
 - 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

Computer Aid Inc. (CAI) IT Staffing Spending



Department	Total Spend	HUB \$	HUB %	AA \$	AI \$	B \$	HA \$	W \$	# of times HUB Vendors used
Administration	\$99,963	\$52,885	52.90%	\$0	\$0	\$0	\$0	\$52,885	1
Administrative Office of the Courts	\$1,539,896	\$300,097	19.49%	\$45,247	\$0	\$14,958	\$0	\$239,891	12
Agriculture & Consumer Services	\$90,820	\$0	0.00%	\$0	\$0	\$0	\$0	\$0	0
City of Raleigh	\$47,494	\$0	0.00%	\$0	\$0	\$0	\$0	\$0	0
Commerce	\$573,454	\$29,026	5.06%	\$0	\$0	\$0	\$0	\$29,026	1
Community College System Office	\$117,699	\$25,838	21.95%	\$0	\$0	\$0	\$0	\$25,838	1
Controller	\$1,029,925	\$602,978	58.55%	\$64,361	\$0	\$0	\$0	\$538,617	10
Elections	\$163,685	\$41,750	25.51%	\$41,750	\$0	\$0	\$0	\$0	1
Environmental Quality	\$282,597	\$89,622	31.71%	\$59,078	\$0	\$0	\$0	\$30,544	4
Fayetteville Technical Community College	\$43,600	\$0	0.00%	\$0	\$0	\$0	\$0	\$0	0
Governor's Office	\$58,909	\$34,688	58.89%	\$34,688	\$0	\$0	\$0	\$0	1
Guilford Technical Community College	\$2,666	\$2,666	100.00%	\$0	\$0	\$2,666	\$0	\$0	1
Health & Human Services	\$15,396,935	\$3,086,342	20.05%	\$1,598,895	\$0	\$52,999	\$0	\$1,434,447	131
Information Technology	\$1,113,718	\$119,606	10.74%	\$0	\$0	\$0	\$0	\$119,606	3
Insurance	\$50,718	\$15,810	31.17%	\$15,810	\$0	\$0	\$0	\$0	1
Justice	\$108,133	\$0	0.00%	\$0	\$0	\$0	\$0	\$0	0
Public Instruction	\$38,528	\$3,019	7.84%	\$0	\$0	\$0	\$0	\$3,019	1
Public Safety	\$262,400	\$0	0.00%	\$0	\$0	\$0	\$0	\$0	0
Revenue	\$116,195	\$0	0.00%	\$0	\$0	\$0	\$0	\$0	0
Transportation	\$6,572,349	\$1,865,208	28.38%	\$640,142	\$0	\$57,625	\$0	\$1,167,441	49
Treasurer	\$247,546	\$0	0.00%	\$0	\$0	\$0	\$0	\$0	0
Wake Tech Community College	\$19,634	\$9,803	49.93%	\$9,803	\$0	\$0	\$0	\$0	1
Wildlife Resource Commission	\$27,257	\$20,393	74.82%	\$0	\$0	\$0	\$0	\$20,393	1
Total	\$28,004,120	\$6,299,731	22.50%	\$2,509,775	\$0	\$128,248	\$0	\$3,661,707	219

- If you have more than \$0 in HUB spending you can add those dollars in the appropriate HUB categories on your IPS HUB Goods and Services Report.
- **Please list any HUB Dollars under SERVICES (Not Term Contract).**

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 order invoices / payments, 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>.



How do we report our HUB spend?

Interactive Purchasing System (IPS) HUB reporting system

- Quarterly reports are submitted to the HUB Office using the IPS HUB reporting system.
- IPS Log ID required.

To get access to the IPS HUB reporting system the HUB Office will need to know a person's:

- First and Last Name
- Title
- Phone Number
- E-mail address

IPS login IDs are set up by the NC Division of Purchase & Contract (P&C), HUB Office has to authorize access.

An e-mail with log in ID and temporary password will come from P&C once log in is set up.



State Agencies

- DOT and NC Ports Authority- SAP
- NC Education Lottery – MS Dynamix
- All others- HUB Spending Report System (SRS)

Community Colleges use e-Procurement and Colleague

Public Universities – systems vary

- Argos / Banner, PeopleSoft, WebFocus

School Systems

- LINQ or SunPac (with a couple exceptions)

Non-Profits – systems vary

- P-card – Not - applicable

P-Card Purchases (any entity) – Bank of America's Works System

HUB Tax ID File – Critical for School Systems

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

HUB Spending Report System



About				
Summary by Quarter				
Summary by Month				
Details				
Filters: 2021 Q1				
Filters ▼				
< Total Spend By Contract Type Total Spend by PO/Non-PO Total Spend by HUB Classification >				
Total Spend By Contract Type				
Contract Type ▲	HUB Status ▲	HUB Category ▲	Payment Amount	Percent of Total
Total			\$736,957,944	100.00%
Subtotal: Term Contract			\$89,721,778	12.17%
Term Contract	Subtotal: HUB Spend		\$15,624,597	2.12%
	HUB Spend	Hispanic	\$91,422	0.01%
		Asian American	\$12,815,506	1.74%
		Female	\$2,370,719	0.32%
		Disabled-Owned	\$346,950	0.05%
	Subtotal: Non-HUB Spend		\$74,097,181	10.05%
	Non-HUB Sp...	Non-HUB	\$74,097,181	10.05%
Subtotal: Commodity			\$320,787,472	43.53%
Commodity	Subtotal: HUB Spend		\$18,439,623	2.50%
	HUB Spend	Black	\$1,582,179	0.21%
		Hispanic	\$340,697	0.05%

- Captures actual spend from NC Accounting System direct payments and eProcurement purchase orders
- Summaries available by Quarter and Month, PO spend and direct payments
- Detail data by PO line item available (including vendor and HUB status)
- Data available 10 days after month or quarter ends

- 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



January 7 2022	Historically Underutilized Business Report	
Page: 1	Institution: Wake Technical Community College	
	Period: 10/01/2021-12/31/2021	
	Total Spent	Percent of Total
Total Department Purchases	\$24,503,355.27	
Total Term Contract Purchases	\$2,026,940.54	
Minority Owned		0.00%
Black		0.00%
Hispanic		0.00%
Asian American		0.00%
American Indian		0.00%
Woman Owned	\$184,918.71	9.12%
Disabled Owned		0.00%
Disabled Owned Business Enterprise		0.00%
Non-Profit Work Center For the Blind		0.00%
Socially and Economically Disadvantaged		0.00%
HUB Subcontractor		0.00%
Total Term Contract Hub Purchases	\$184,918.71	9.12%
Total Service Contract Purchases	\$1,273,320.77	
Minority Owned		0.00%
Black	\$227.71	.02%
Hispanic		0.00%
Asian American	\$7,000.00	.55%
American Indian		0.00%
Woman Owned	\$23,508.89	1.85%
Disabled Owned		0.00%
Disabled Owned Business Enterprise		0.00%
Non-Profit Work Center For the Blind		0.00%
Socially and Economically Disadvantaged	\$1,278.75	.10%
HUB Subcontractor		0.00%
Total Service Contract Hub Purchases	\$32,015.35	2.51%

January 7 2022	Detailed Historically Underutilized Business Report			
Page: 1	Institution: Wake Technical Community College			
	Period: 10/01/2021-12/31/2021			
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Minority Term Contract Purchase:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Black Term Contract Purchase:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Hispanic Term Contract Purchase:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Asian American Term Contract Purchase:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total American Indian Term Contract Purchase:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
Total Minority Service Contract Purchase:				\$0.00
Vouchers	Qty	Comm Code	Item Description	Total Cost
V0706140	1.000	96286	shipping	\$227.71
Total Black Service Contract Purchase:				\$227.71
Vouchers	Qty	Comm Code	Item Description	Total Cost

LINQ – Purchasing Category Report

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.



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 - ROTC Teacher	19,808.82	19,808.82
N - N			129	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			165	Substitute Pay - Non-Teaching	3,132.51	3,132.51
N - N			167	Tchr. Asst. Pay - Reg. Absence	141.91	141.91
N - N			171	Salary - Driver	1,129.21	1,129.21
N - N			172	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	680.00	680.00
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	260,248.74
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			459	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

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

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.

```

Session A - [24 x 80]
File Edit View Communication Actions Window Help
Print HUB Report

1 Enter Starting Period To Process..... 01
2 Enter Ending Period To Process..... 12
3 Use (P)urchase $ or (I)nvoice $ ..... P
4 Print Vendor Details (Y/N)?..... N
5 Suppress Lines With Zero Amounts (Y/N)?..... N
6 Enter Printer Name..... QPRINT_____

F3=Exit    F9=Recall Options    F10=Save Option    F11=Submit to Batch
  
```

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



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	

- 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
- If no funds carried over from prior fiscal year and no allocation for this fiscal year, please enter \$0 for totals in IPS and submit report.

- 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](#)

Click on Quarterly
HUB Information



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

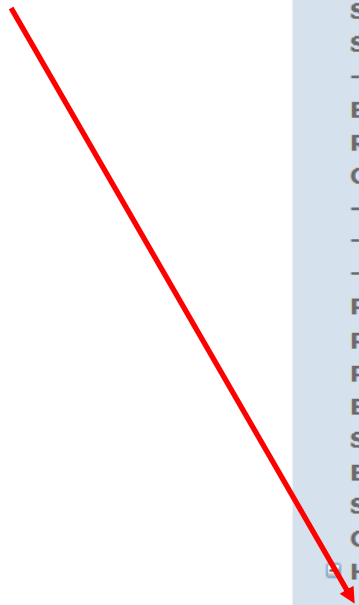
Create Report/Excel Spreadsheet

HUB Procurement Reporting

Quarterly HUB Information































Agency HUB Procurement List

Your Inbox Is Empty

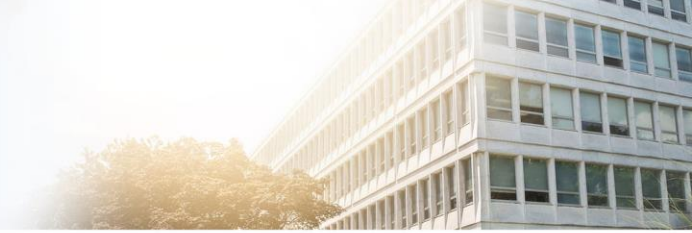


- Each Quarter will have its own row and link. FY 20-21 reports should be on Page 2
- Current reporting quarter will be at the bottom
 - Status will be “Pending” until you Approve the report
 - Status will be “Submitted” once report is Approved
- Click on the notepad and pencil icon to EDIT the appropriate 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

IPS HUB Procurement Reporting Screen



Agency: DEPARTMENT - Administration
Beginning Fiscal Year: 2014
Quarter: 4th - Apr 1 - June 30

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

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

- Whole numbers only
- Do NOT enter \$ symbol, commas or periods
- 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 (Do NOT edit Quarter 4 data once submitted UNLESS YOU GET APPROVAL FROM THE HUB OFFICE).

Review and Approval Screen



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)	\$71,750	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"/>		

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

- 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.



- DBE = Disabled Business Enterprise*
- NPWC = Nonprofit Work Center for the Blind and Severely Disabled
- NC General Statute 143-48 directs that spending with these organizations be captured but it has been determined that they should NOT count toward the HUB participation percentages. These categories are self-identified business characteristics in the eVP registration system. HUB does not certify them.
- We will continue to capture the spending the same way we have been in IPS, but IPS will be revised so that DBE and NPWC percentages are determined separately against Total spend.
- This change is already in place in the HUB Spending Report System.

*Not to be confused with the Department of Transportation's Disadvantaged Business Enterprise certification.



How to find HUB vendors?

Statewide Uniform Certification Search for Vendor Information

- The HUB Office maintains the 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. You can opt to search for NCSBE certified firms.
 - Count changes frequently.
- You can search by company name, City, County, Commodities, Construction specialties.
- For company name search type in first 3-4 letters of company name (search is very literal).
- Use “%” in front of your search criteria if the name of the company does not start with your search criteria. Example: %plumb (to find plumbers).



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.

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

NC SBE Certified: Not Specified

Small Business: Not Specified

City:

County: Hold down the control (Ctrl) key and click to select multiple counties.

Page 1 of 2

Company Name	Address	City, State
ACME PLUMBING CO ACME-BIDS	124 Styers Rd.	Winston-Salem, NC
Banks Channel Plumbing & Mechanical LLC	PO Box 973	Wrightsville Beach, NC
blue ridge plumbing incorporated blue-ridgeplumbinginc@hotmail.com	255 eagle rock lane	burnsville, NC
BUCKNER PLUMBING & HEATING	1240 US 70 W	Marion, NC
Burris Plumbing, Inc.	P O Box 480263	Charlotte, NC

HUB Vendor Search Example:

- Click “Create Excel Spreadsheet” to download the list into Excel.

- Search Criteria are shown for each search.

- Click on the Company Name to get more information.

- If no results:

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 20 records found

1 2								
Company Name	Address	City, State	County	Zip	Contact Info	NC Small HUB SBE Bus.		
Advanced concepts of southport inc Advanced Concepts of Southport INC	516 lord street	southpoirt, NC	BRUNSWICK	28461	Contact: frink, jwantana Phone: 910-352-8025 x TollFree: 910-713-0030 Email: jgfrink@att.net	B	Yes	Yes
B & B Crane Service, LLC	5007 Northside Dr PO Box 1594	Shallotte, NC	BRUNSWICK	28459-1594	Contact: Powell, Megan Phone: 910-755-5668 x Fax: 910-754-9381 Email: office@bandbcraneservice.com	W	No	Yes



Change Search New Search Create Excel Spreadsheet

Search Criteria:

HUB Certification: Yes

County: 'ALEXANDER'

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

No vendors found!

Total of 0 records found

HUB Vendor Search Example:

Advanced concepts of southport inc

Detail Information	
Contact:	jwantana frink
Address:	Advanced Concepts of Southport INC 516 lord street southpoint, NC 28461 BRUNSWICK United States
Phone:	910-352-8025
Fax:	
Toll Free:	910-713-0030
Email Address:	jgfrink@att.net

Added on: 8/13/2020 3:00:34 AM

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

Service Type/License/Work Classification
General Contractor NC License No. 66160 Limitation - Limited - Residential
General Trades/Sub Contractor NC License No. 66160

Registered Construction Codes
01800 Facility Operation (Maintenance)
01900 Facility Decommissioning (Hauling/Debris Removal)

Registered Commodities
7210 Building & facility maintenance & repair services
7211 Residential building construction services

Company information includes:
Contact information

HUB category

Services / License Numbers

Registered Construction Codes

Registered Commodities

Posting Request for Bids on IPS

NC Interactive Purchasing System (IPS)

- Available for use by public entities (account may need to be set up if not already in place).
- Certain IPS users can log in and post RFPs.
- IPS public site: <https://www.ips.state.nc.us/ips/>
- E-mails sent to vendors that selected codes indicated in the IPS posting (HUB & Non-HUB).

Education & Training SVC						
Solicitation Number	Description	Date Issued	Bid Opening Date	Bid Opening Time	NC BIDS/ NCEP Sourcing	Help
12-001202	12-001202 Hazardous Materials Tech Course	1/18/2022	2/18/2022	02:00 PM ET	NCEP	12-
248-227200022	Improved Culture of Opportunityand Belonging	1/21/2022	2/18/2022	2:00 PM ET	eBid	248-
12-001201	NCHILB Board-Developed Update Course FY 2022-2023	1/11/2022	2/17/2022	02:00 PM ET	NCEP	12-
251-22-292	SPECIAL EDUCATION MATH CURRICULUM	1/14/2022	2/4/2022	02:00 PM ET		251-
251-22-292-1	Addendum 1 --- EXTENSION TO BID DEADLINE					

Posting Bid Opportunities on HUB Office website

- Anyone can submit a bid opportunity.
- Minimum of 12 days before bids due (2 business days for posting, 10 calendar days before bids due).
- Bid Submission address: <https://ncadmin.nc.gov/businesses/historically-underutilized-businesses-hub/submit-contractor-bid-opportunity-hub>

Organization Information

Organization Submitting BID Notification *

BID Information

BID Due Time *

Hour : ☒ am ☐ pm

BID Due Date *

Month Day Year

BID Location Street Address *

City *

Upcoming Events - HUB Bid Opportunities

145 upcoming events

Starts

12/28/2021

E.g., 12/28/2021

Search for project or city

Apply

Reset

Tuesday, December 28, 2021

[Robeson County - RFQ Engineering Services Town Of Fairmont Wastewater Treatment Plant - Lumberton, NC](#)

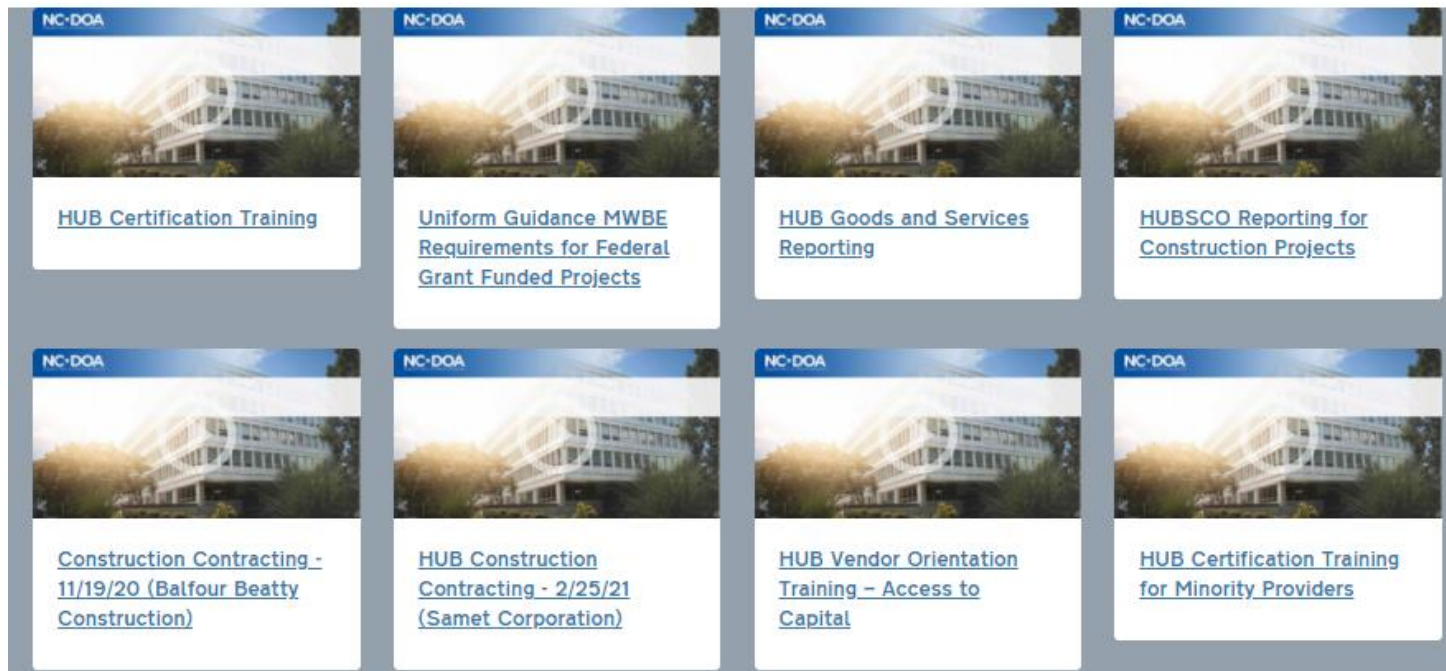
TUESDAY, DECEMBER 28, 2021
550 NORTH CHESTNUT STREET
LUMBERTON, NC 28358
UNITED STATES

- **Minority Print Media / Websites :**

<https://ncadmin.nc.gov/businesses/historically-underutilized-businesses-hub/business-resources/minority-print-media>

- List shows publisher, location, contact information, coverage area and circulation frequency.
- Ads can be placed for a cost.

Video Training Recap



<https://ncadmin.nc.gov/businesses/historically-underutilized-businesses-hub/business-resources/video-training-recap>

Overview of NC HUB Office

Definition of a Historically Underutilized Business

Who is required to report on purchases of goods & services

When reports are due

How to report in IPS

How to find HUBs

NC Office for Historically Underutilized Businesses

huboffice.doa@doa.nc.gov

984-236-0130

John Guenther, Compliance Officer

john.guenther@doa.nc.gov

984-236-0141