SEARCHING HUB DATABASE AND REPORTING HUB VENDOR DATA

Training Guide

The Equal Business Opportunity Program (EBOP) promotes opportunities for minority and women-owned firms to do business with the City of Durham. Historically, the EBOP focused primarily on these firms' participation in construction and professional services contracts. With the updated EBOP ordinance in April 2016, the program expanded to include service contracts and purchases of goods.

For service contracts, the City now has a goal of 7% participation by minority-owned firms and 5% by women-owned firms. For goods, the City's goals are 2% participation by minority-owned firms and 4% by women-owned firms.

Since every purchase or contract is an opportunity to help achieve these overall goals, departments should seek to include certified minority and women-owned firms in solicitations for quotes whenever possible.

EXPECTATIONS FOR DEPARTMENTS

Departments seeking to purchase goods or enter into service contracts should follow these steps:

(1) **Search** the NC Historically Underutilized Business (HUB) database for possible vendors <u>before</u> requesting quotes for goods or services.

(2) If HUB vendors are found, **invite** all of them to provide quotes for the product or service (along with other vendors).

(3) **Provide data** about use of HUB vendors during the MUNIS requisition workflow.

This training guide provides directions for completing each of these steps.

EXEMPTIONS

The following transactions are exempt from these requirements:

o Purchases or service contracts less than $2,500
o Purchase made by P-card
o Purchases made through State Contracts or purchasing cooperative agreements (NIPA, US Communities, etc.)

In addition, HUB data does not need to be provided for certain routine requisitions. See page 4 for more information.

STEP 1: SEARCH THE HUB DATABASE

The City of Durham no longer directly certifies minority and women-owned businesses. Instead, the City relies on the State of North Carolina's Historically Underutilized Business (HUB) certification program to identify these firms. This program certifies thousands of firms from across North Carolina and the United States.

Departments should search the State-maintained HUB database to identify available HUB vendors <u>before</u> requesting quotes for goods or services.

For purchases or contracts greater than $10,000, contact Equal Opportunity/Equity Assurance for assistance.

The HUB database is available at this URL: https://www.ips.state.nc.us/vendor/searchvendor.aspx?t=h

The database can also be accessed by typing "NC HUB database" into your search engine, then selecting the "NC DOA: Historically Underutilized Business" search result. From the main HUB page, click on **HUB Vendor Search** to open the database.

LOOK UP A SPECIFIC VENDOR

The first section of the Vendor Search page allows you to look up a specific firm. If you want to verify that a specific firm is a certified minority or women-owned business, type the first few letters of the business name into the **Company Name** field.

SEARCH FOR VENDORS WHO CAN PROVIDE A GOOD OR SERVICE

For most searches, you will instead want to generate a list of possible vendors that can provide the good or service you need. To find vendors who provide a particular good or service, scroll down the page to the **Commodities** field.


Tips for Searching the Commodities List

- Use the up and down arrows to navigate through the list.

- Hold down the Control (Ctrl) key and click items to select multiple commodities at once.

- To jump to a specific category, click on **All**, then begin typing the first few letters of the commodity name.

   o *For example, click **All** and then type **c-l-e** to jump down to the "Cleaning Compounds, Detergents, Solvents…" category.*

- You may sometimes need to use trial and error to find the right commodity code. Having trouble? Contact the Equal Opportunity/Equity Assurance staff for assistance.

   o *For example, if you are searching for uniforms, you may scroll down to "U" and find that there is no Uniform category. Try looking under "Clothing" instead.*

- You do not need to limit your search to a specific county, so check that **All** is selected in the **County** box.

Generating Search Results

1. Once you have selected the commodity code(s) you want to search, click **Search** at the bottom of the page**.**
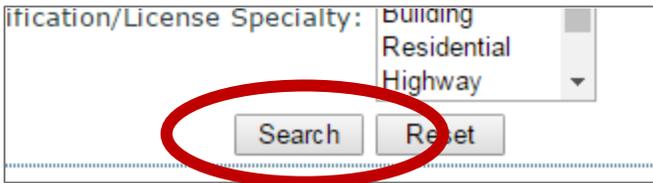
2. A new page will open with a list of vendors, if any are found.

3. If **no vendors** are found, a message will display on the screen. **Take a screenshot of this page and save it.** You will need to submit this screenshot when entering your requisition.
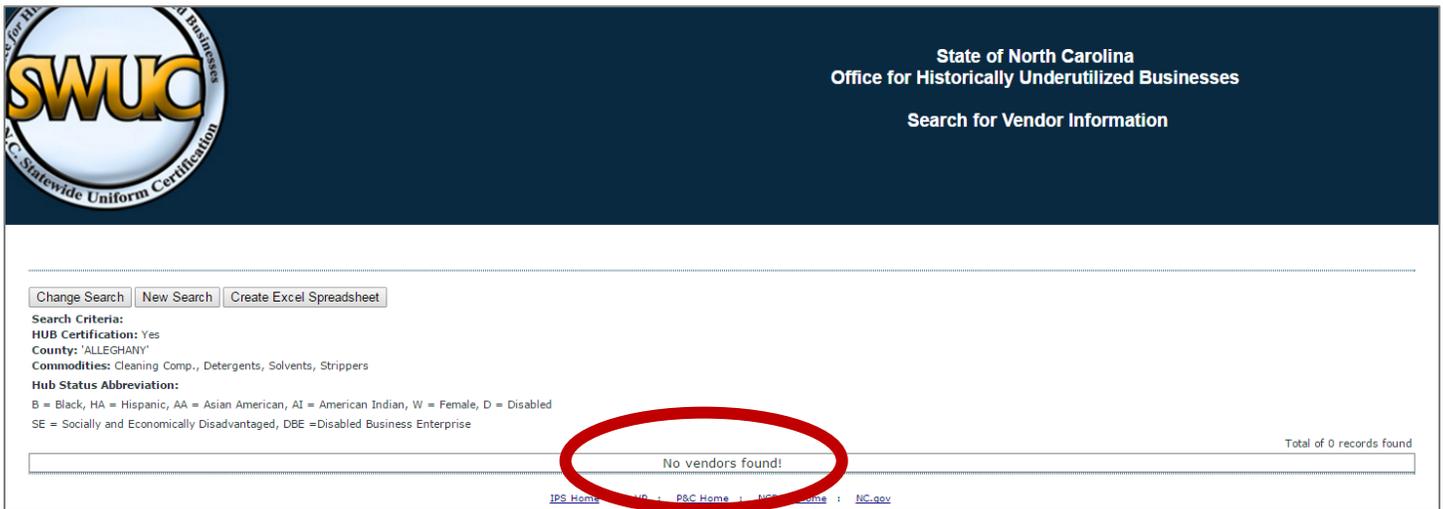
4. If vendors are found, download the list as an Excel spreadsheet. Click the **Create Excel Spreadsheet** button to download the file. Be sure to **save** this list, as you will need to submit this screenshot when entering your requisition.

Remember, **if you need any assistance in searching the HUB database, contact the Equal Opportunity/Equity Assurance Department.**

STEP 2: INVITE VENDORS TO BID OR PROVIDE QUOTES

If you did not find any HUB vendors who could provide the category of good or service you need, save the screenshots of your search results and continue with your normal purchasing process.

If you did find HUB vendors during your search, include all of them in your RFP notification or solicitation for quotes.

For informal quotes, sending an email invitation to quote is preferred. Send the solicitation to any other vendors you wish at the same time. When requesting informal quotes, you should specify:

- Specifications/detailed description of the product or services needed
- How to submit a quote
- Deadline for submitting quotes (minimum of 3 days; one week is preferred)

Once you have included any available HUB vendors in your solicitations, proceed with your normal vendor selection process. Be sure to retain copies of any quotes you receive, even if they are not selected.

See Appendix 2 for a guide to copying email addresses from the Excel spreadsheet into Outlook.

STEP 3: PROVIDE EBOP DATA ON REQUISITION FORM

You will be asked to provide EBOP information while completing a requisition form for your purchase or contract. This information will help EO/EA verify compliance with the above requirements and gather data about whether or not HUB vendors are choosing to compete for City contracts.

When you are preparing to submit the requisition, click on the **User Defined** tab to answer the EBOP questions.

Click the **Value** field to select **Yes** or **No** for each question.
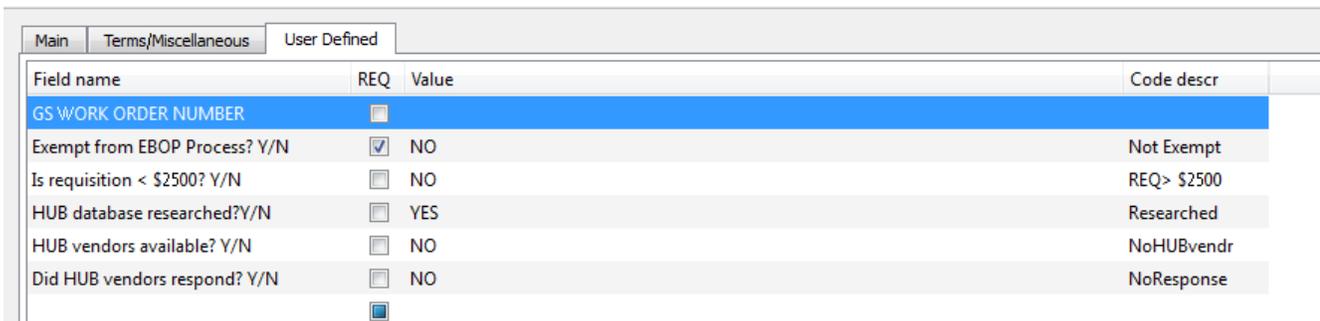
Main	Terms/Miscellaneous	User Defined			
Field name		REQ	Value		Code descr
GS WORK ORDER NUMBER		☐			
Exempt from EBOP Process? Y/N		☑	NO		Not Exempt
Is requisition < $2500? Y/N		☐	NO		REQ> $2500
HUB database researched?Y/N		☐	YES		Researched
HUB vendors available? Y/N		☐	NO		NoHUBvendr
Did HUB vendors respond? Y/N		☐	NO		NoResponse
		☐			

Question 1: Is this requisition exempt from EBOP Process?

NOTE: This question must be answered for **ALL** requisitions.

- If you answer **Yes**, you do not have to answer any additional questions and may submit the requisition as normal.
- If you answer **No**, proceed to Question 2.

Select "Yes" for any of the below:
- Purchases made through state contracts or purchasing cooperative agreements (NIPA, US Communities, etc.)
- Contract payment purchase orders

- Term contract purchase orders
- Blanket purchase orders
- Confirming purchase orders
- Reimbursements and refunds

Question 2: Is this requisition less than $2,500.00?

- If you answer **Yes**, you do not have to answer any additional questions and may submit the requisition as normal.
- If you answer **No**, proceed to answers Question 3, 4 and 5.

Question 3: Has the HUB database been researched?

*Remember: Searching the HUB database is **required** except for the exemptions listed in Question 1 and 2.*

Question 4: Were HUB vendors available?

If your search of the HUB database did not find any vendors, select **No** and **attach the screenshot** of the "No vendors were found" screen to the requisition form.

If you did find HUB vendors, select **Yes** and **attach the spreadsheet of search results** to the requisition form.

Question 5: Did HUB vendor(s) respond?

If none responded, select **No**.

If HUB vendors responded, select **Yes** and attach the quotes (along with any other received) to the requisition form.

APPENDIX 1: Checklist for Departmental Purchasers   *(Optional)*

In many departments, vendor selection and requisition processing are handled by different staff. In these cases, departments may wish to use this checklist to make sure requisition submitters have everything needed to answer the EBOP questions.

Part I

☐ This purchase or contract is exempt from EBOP requirements because (choose one):

    ☐ It is less than $2,500.

    ☐ It was made through a state contract or purchasing cooperative agreement (NIPA, US Communities, etc.).

☐ This purchase or contract is NOT exempt from EBOP requirements. (*Complete Part II*)


Part II

☐ Yes   ☐ No   Did you search the State HUB database for available vendors for this product or service?

☐ Yes   ☐ No   Did your search turn up any possible vendors?
(Please attach spreadsheet or screenshot of search results.)

☐ Yes   ☐ No   Did you ask all of those vendors for quotes?

☐ Yes   ☐ No   Did you receive any quotes from HUB vendors? *(If so, please attach.)*

☐ Yes   ☐ No   Did you ultimately select a HUB vendor?

APPENDIX 2: Copying Email Addresses from Excel List into Outlook Email

The HUB database outputs vendor search results into an Excel worksheet. You will likely want to copy a whole column of email addresses into Outlook at one time to email possible vendors.

Outlook requires that email addresses be separated by semicolons (;). To copy a list of email addresses from Excel into Outlook, you must first add semicolons to each address. Follow the steps below.

1. Find the column of the spreadsheet containing the vendor email addresses. *(This is usually column J.)*

2. Insert a new blank column next to the email column.
    a. Right-click on a cell in the email column.
    b. On the pop-up menu, click **Insert**, then **Entire column**. Click **OK**.

3. A new column will appear. Change the format of this column to General.
    a. Click the letter at the top of the new column to select the whole column. *(The column will turn blue.)*
    b. Right-click in the column.
    c. On the pop-up menu, click **Format Cells**.
    d. On the Number tab, under Category, select **General**. Click **OK.**
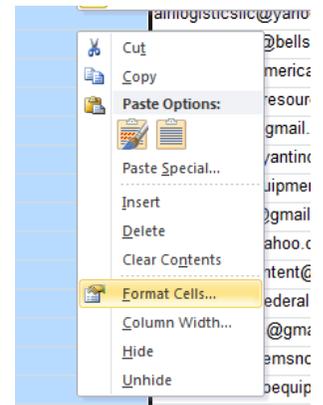
4. In the second cell of the new column (cell J2), type this formula:
    =K2&";"
    (K2 is the second cell of the email column.)

5. Copy and paste this formula all the way down the new column.*

6. You should now have a column of email addresses that end in ";" and are ready to copy into Outlook. Click and drag to select all of these email addresses.

7. Copy and paste these email addresses into the "To" box of your Outlook email.

8. Send your email as you normally would.

* To copy and paste, right-click the cell or column you want to copy. In the pop-up menu, click **Copy**. To paste, right-click your destination, then click **Paste** (or the first icon under **Paste Options)**.

To paste a formula into a whole column, click and drag to select all the destination cells, then right-click and click **Paste** (or the first icon under **Paste Options)**.