

UNC SYSTEM CAPITAL PROJECT PROCEDURE GUIDANCE

FOR CAPITAL PROJECTS FROM GENERAL FUND SOURCES

Effective July 1, 2019; Updated June 1, 2021

	ACTIVITY	PROJECT DOLLAR THRESHOLD*		
		Up to \$500,000**	>\$500,000 to \$2,000,000**	>\$2,000,000**
AUTHORIZATION	Capital Project Authority (General Fund Sources Only, Cash or Debt)	Authorized by Legislative Action, except the chancellor may authorize repair and renovation projects \$600,000 or less. Submit CI-1 and OC-25 to UNCSCO	Authorized by Legislative Action, except the chancellor may authorize repair and renovation projects \$600,000 or less. Submit CI-1 and OC-25 to UNCSCO	Authorized by Legislative Action
	Capital Code/Item #	<ul style="list-style-type: none"> • UNCSCO establishes in Interscope • UNCSCO establishes in IBIS, except university establishes Chancellor's projects • University establishes related financial system entries (Fund/Center, etc.) 	<ul style="list-style-type: none"> • UNCSCO establishes in Interscope • UNCSCO establishes in IBIS, except university establishes Chancellor's projects • University establishes related financial system entries (Fund/Center, etc.) 	<ul style="list-style-type: none"> • UNCSCO establishes in Interscope • UNCSCO establishes in IBIS • University establishes related financial system entries (Fund/Center, etc.)
DESIGN	Designer Selection (Refer to G.S. 133-1.1)	Open-end agreement or Direct selection	Public advertisement	Public advertisement
	Approval of Selection	BOT	BOT	BOT
	Designer's Contract	<ul style="list-style-type: none"> • University negotiates • University executes 	<ul style="list-style-type: none"> • University negotiates • University executes 	<ul style="list-style-type: none"> • SCO negotiates • University executes, copy to SCO
	Reporting/Recording	University records in Interscope	University records in Interscope	SCO records in Interscope
	Plan Review and Approval	<ul style="list-style-type: none"> • SCO code review, as applicable • SCO electrical inspections required 	<ul style="list-style-type: none"> • SCO code review, as applicable • SCO electrical inspections required 	Full SCO oversight
CONSTRUCTION	Bidding	<ul style="list-style-type: none"> • University informally solicits competitive bids • Public bidding not required 	<ul style="list-style-type: none"> • University solicits competitive bids • Informal solicitation for estimated construction cost <\$500,000 • Formal solicitation for estimated construction cost >\$500,000 • Public bidding required per G.S. 143-129 	<ul style="list-style-type: none"> • University solicits competitive bids • Formal solicitation for estimated construction cost >\$500,000 • Public bidding required per G.S. 143-129
	Forms for Bid Documents	Template SCO informal contract format, notice to bidders, and general conditions, supplemented w/ institution-specific requirements	UNC System formal contract template, notice to bidders, and general conditions	SCO State of North Carolina formal contract template, notice to bidders, and general conditions
	Bonding Requirement	Not required by law, University can require	Required on formal bid solicitations (>\$500,000)	Required
	Contract Awarding Authority	University	UNCSCO	SCO
	Form of Contract	Informal	Informal or UNC System formal according to bid type	SCO State of North Carolina formal
	Reporting/Recording Contract	University	University	<ul style="list-style-type: none"> • SCO awards • University executes, copy to SCO
	HUB Participation Reporting	University	University	<ul style="list-style-type: none"> • SCO makes entries at award • University maintains current entries • University updates at final acceptance
	Change Order (CO) Processing	<ul style="list-style-type: none"> • University authorizes/approves • University executes in writing • University records in Interscope, manual entry 	<ul style="list-style-type: none"> • CO initiated in Interscope • University authorizes/approves in Interscope • CO documents maintained in Interscope 	<ul style="list-style-type: none"> • CO initiated in Interscope • University authorizes/approves in Interscope • SCO authorizes/approves in Interscope • CO documents maintained in Interscope
Final Inspection	If designer is engaged, designer certification is required	<ul style="list-style-type: none"> • Designer's certification required • Notify SCO of scheduled final inspection 	<ul style="list-style-type: none"> • Designer's certification required • SCO final inspection required 	

*Project authority thresholds are based on the overall project budget, including design, construction, contingency, etc. Contract awarding authority follows initial project authority level. Construction bidding thresholds are based on project **construction cost** alone.

**All construction contracts over \$30,000 must be entered in Interscope with HUB participation reported in compliance with G.S. 143-131.

ACRONYMS: BOG - Board of Governors

BOT - University Board of Trustees

SCO - State Construction Office

UNCSCO - UNC System Office