

ADDENDUM #1: RFP Updates/Q&A's



**STATE OF NORTH CAROLINA
Appalachian State University**

Refer <u>ALL</u> Inquiries regarding this RFP to: Lori Brown Email: brownlg2@appstate.edu PH: 828-262-8130	Request For Proposal # RFP55-080825
	Bids will be publicly opened: August 26, 2025 @ 2:00 pm
	Contract Type: Open Market
	Commodity Description: ASU Call Center Support
	Using Agency: Appalachian State University

This addendum is issued to:

RFP55-080825 ASU Call Center Support:

RFP Updates:

Appalachian State University will reach out to selected vendors once the finalist list has been determined. Finalists will then be given the opportunity to ask additional clarifying or detailed questions.

Please disregard the mention of completing a Vendor Self-Assessment mentioned in the below areas of this RFP:

Pg.13, 4.1 Financial Proposal, item D

Pg.17, 5.3 Technical Approach, 1st paragraph, PLEASE NOTE section and

5.4 Software Functionality, 1st paragraph.

A Vendor Self-Assessment is not needed for this RFP.

KPI (Key Performance Indicators):

One of the more frequently asked questions was regarding KPIs, such as Average Handling Time, Average Speed to Answer, Abandonment Rate and First Call Resolution Percentage. We do not currently collect this data but we would like to start doing so with our new vendor.

Questions and Answers:

RFP Section / page #	Question
RFP Section 4, Page No.9	How is the current contact center structured, is it In-house or Outsourced? If outsourced, who is the current contractor? This is a Bid - We do not disclose information on an incumbent Vendor, current costs or budgets.
RFP Section 7, Page No.12	What is the estimated budget set aside for this project? We do not disclose information on an incumbent Vendor, current costs or budgets.
RFP Section 7, Page No.12	What is the current cost incurred by Appalachian State University to manage the present contact center? We do not disclose information on an incumbent Vendor, current costs or budgets.
RFP Section 5, Page No.11	Would you be open if the proposal includes Artificial Intelligence along with a live agent support? Or only Artificial Intelligence answering questions during the peak times*? We will consider all proposals, but exclusively using AI is not currently acceptable.
RFP Section 5, Page No.11	Do you require this support for peak times* only or would you be open for 24x7x365 support options as well? Feel free to provide a range of estimates for all services, but the scope of this RFP is for the limited engagements specified in the RFP (page 16, section 5.1).
RFP Section 5, Page No.11	What is the monthly breakdown of volumes for total inbound calls, chats, emails, and web cases separately? Our per activation call volume is estimated to be between 1600-2700 calls. Vendor is only responsible for calls during the activation period.
RFP Section 5, Page No.11	What is the performance of your current delivery in terms of Average Speed to Answer? We do not have this data available but we would be interested in collecting this data moving forward.
RFP Section 5, Page No.11	What is the performance of your current delivery in terms of Average Handle Time? We do not have this data available but we would be interested in collecting this data moving forward.
RFP Section 5, Page No.11	What is the performance of your current delivery in terms of Abandon Rate percentage? We do not have this data available but we would be interested in collecting this data moving forward.

RFP Section / page #	Question
RFP Section 5, Page No.11	What is the performance of your current delivery in terms of First Call Resolution percentage? We do not have this data available but we would be interested in collecting this data moving forward.
RFP Section 4, Page No.9	What are the pain areas in your current delivery center? Cost only.
RFP Section 2, Page No.5	What are the strategic initiatives Appalachian State University is looking to achieve through this RFP? Support for our Student Accounts department during peak call volume periods
RFP Section 5, Page No.11	Is Appalachian State University considering adding other student support services in the future, like admissions, bursar, registration and records etc.? Student Accounts is the Bursar. Currently not looking at other support services.
	Could you please confirm the expected hours of operation for the call center during the active billing periods? 8:00am – 5:00pm ET, M-F
	Could you clarify the call volume expectations? Are there peak hours each day? Does it taper each week or is it expected to be 30-200 calls on average per day throughout the project? That range takes into account the peak and the “taper”.
	Is there an estimated or historical average handle time for the types of calls typically received during these billing windows? Not tracked currently
	Aside from routing based on academic program, is there any information we are required to capture for data input from callers (e.g., name, student ID, call reason)? User ID, Time, Name of Caller (& name of student if caller is a parent), Reason for Call, How resolved, detailed notes of call.
	While a daily call log is mentioned, could you please clarify: What specific data points are expected in these reports (e.g., total calls, transfer rate, resolution type)? We currently receive the data via excel sheet. Data points to collect include, but are not limited to: total calls, number and percentage of calls transferred, reason for call, resolution, and we would like to start collecting AHT, ASA, and abandonment rate. Is a specific reporting format or tool required? No specific format or tool is required.
	Will the awarded vendor need to interface with any specific CRM or student information system (e.g., Ellucian Banner), or is the work limited to calls only? Calls only; the vendor will not integrate with our systems.
Section 5.1, page 16	What are the desired hours of operation for the contact center? 8:00am – 5:00pm ET M-F

RFP Section / page #	Question
Section 5.1, page 16	What are the file specifications for the daily call log? User ID, Time, Name of Caller (& student's name if caller is a parent), Reason for Call, How resolved, detailed notes of call.
Section 5.1, page 16	What are the SLA expectations? Majority of calls should be answered within 15 minutes. Estimated hold times should be provided while they wait.
5.1 Specifications	Besides daily call logs, are there any specific analytics or KPIs ASU expects (e.g., first-call resolution rate, average handle time)? We expect some form of customer satisfaction survey to be offered at the end of the call. We would like speed to answer, call duration, calls transferred with location, and abandonment rate.
5.1 Specifications	Can you provide historical data on call volume patterns beyond the stated averages (e.g., hourly peaks, weekly fluctuations)? No, however once a vendor is selected, we will provide information on when we expect call volume to increase or decrease
5.0 Product Specifications and Scope of Work	Are there any expected changes in student enrollment or billing practices that might affect call volume? No
5.0 Product Specifications and Scope of Work and Call Center Guide	What is the expected mix of callers (students, parents, faculty, staff) during peak periods? Primarily Students and Parents. The mix varies but the answers are primarily the same.
5.4 Software Functionality	What existing integrations with Ellucian Banner or other ASU systems should the solution support? No integrations
5.1 Specifications	What is the target hold time expectation for SLAs (e.g., average speed of answer, maximum hold time)? Target hold time is less than or equal to 15 minutes with expected wait time conveyed on hold. Acceptable hold time is no more than 25 minutes.
5.0 Product Specifications and Scope of Work and Call Center Guide	What is the expected timeframe for ramp-up before the first live call period? Go live happens at our peak. No ramp-up. Once turned on, we are at our peak.
General	What is the anticipated budget of this project? This is a bid, we will not disclose the budget.

RFP Section / page #	Question
Section 2.4, p.8	What is the expected go-live date for the program following contract award? November 20th is the anticipated go live date for our Spring Billing Engagement.
Section 5.0, p.16	What is the expected length of training (number of hours or days)? Training is reviewing our website and the document provided. If additional training is needed, we can provide talking points and a brief summary via a zoom meeting if needed.
Section 5.0, p.16	Will Appalachian State University provide the training curriculum/program content? Training is reviewing our website and the document provided. If additional training is needed, we can provide talking points and a brief summary via a zoom meeting if needed.
Section 5.0, p.16	What are the language requirements for this program? English, we prefer to have spanish as an additional option; however, it is not required.
Section 5.0, p.16	What is the current telephony and call management technology being used for this program? Unsure of current vendor tech. Appstate has VOIP and transfers calls to a number the vendor provides and at that point, it is with the vendor (unknown call center technology) and resolved or transferred from there.
Section 5.0, p.16	What is the current Average Handle Time (AHT) by channel, if multiple channels are in scope? We do not have this data and do not currently have an expected AHT.
Section 5.0, p.16	Can you provide historical volume for all channels being serviced under this program? Please include monthly and intra-day volume patterns. Prior estimate is the best overall data we can provide. Upon signing and pre-activation, we can provide anticipated high-volume days.
Section 5.0, p.16	Are there any peak days or patterns within the seasonal windows that would require additional staffing beyond standard ramp-up? No
Section 5.0, p.16	How many agents does the incumbent have supporting this program during steady state and peak periods? Between 2 and 8, depending on volume anticipated and received.
Section 5.0, p.16	Can agents be cross-trained to provide services across all activities or channels (if applicable), or will they be dedicated to one function only? N/A

RFP Section / page #	Question
Section 5.0, p.16	What are the top goals for the chosen vendor to focus on beyond answering high-level student account questions and meeting hold time SLAs? Provide a sustainable cost structure with communication with our management.
Section 5.3, p. 17	Can you please clarify what technology will ASU provide and what technology is expected from the vendor? We will not provide technology. We will transfer the call to a number you provide. From there, it will be in your call center system.
4.2 TRANSPORTATION AND IDENTIFICATION	What kind of products specifically we would we be shipping out? This is not applicable to this RFP as there will be no shipping of products
	Who is the current vendor? Have you been satisfied with the incumbent's performance? This is a Bid - We do not disclose information on an incumbent Vendor, current costs or budgets
	How many total agents are required to handle the call volume of this call center? Recommend no less than 2, at max peak 6-8
General	Could ASU confirm the anticipated length of the training period? No formalized training is planned beyond the Call Center Guide, but we can provide additional training via zoom as needed
General	Can ASU share who the incumbent vendor is? No
General	Does ASU require any after-hours handling (voicemail, callback SLAs), or is the service strictly within weekday hours? Weekday hours only
Section 4.1, Page 13	What is the state's current budget for the full contract year for this project? This is a Bid - We do not disclose information on an incumbent Vendor, current costs, or budgets.
Section 4.6, Page 14	When referencing "model of equipment", is the state referring to the entire call center solution, or just the equipment that is used? We are referring to the entire call center solution. It does not have to be the "exact" same model.
Section 4.7, Page 14	Can ASU clarify, "Any personnel... may be required to undergo a background check..."? Does every representative hired need a background check? (Per the state, Any personnel or agent of a Vendor performing Services under any Contract arising from this RFP may be required to undergo a background check at the expense of the Vendor, if so requested by the State. It is important that all personnel have valid background checks available if the State requests them.)
Section 5.0, Page 16	How would ASU like its training program to be implemented? Would you prefer our team to lead the program independently, or collaborate with its internal training team? Call Center Guide is the best source of info. Vendor Supervisor will be trained additionally as needed and can convey to Call Center Reps.

RFP Section / page #	Question
Section 5.0, Page 16	Please confirm the expected hours of operation for the call center, including daily start and end times, weekend coverage requirements, and whether service will be required on ASU-recognized holidays. M-F 8am-5pm Eastern Time. No Nights, Weekends, or Holidays/Closures observed by ASU. Closures/Holidays occur only on Thanksgiving (2 days Th, Fri), and Winter/Christmas Break, which varies but typically lasts from just before Christmas Eve until the first business day after Jan 1. These will be provided in detail upon execution of the Contract and well in advance for future engagements.
Section 5.0, Page 16	Is a Work From Home (WFH) staffing model permissible for this contract, provided all compliance, data security, training, and quality assurance requirements are met? Yes
Section 5.0, Page 16	Are there any additional training materials or documentation beyond what has already been shared? No
Section 5.0, Page 16	Will the call center be required to handle emails, chats, or other communication channels in addition to phone calls? No
Section 5.0, Page 16	Which quality standards or key performance indicators (KPIs) are most critical to ASU? Caller Hold Time, Caller Customer Service Survey (Vendor Provides), Transfer Efficiency, Escalation to level 2 support percentage
Section 5.0, Page 16	What internal ASU software will the vendor have access to? Does the state have a requirement that the vendor needs to integrate with ASU software or will the vendor using a CRM be sufficient to document call outcomes? None
Section 5.1, Page 16	What percentage of calls does ASU receive from non-English-speaking callers? Will the vendor be expected to handle these calls or will ASU handle them? Not currently tracked
Section 5.1, Page 16	For the “manager communicates directly” requirement, what cadence and channel (daily standup, weekly business review) does ASU prefer? Daily emails, Weekly Zoom if needed.
Section 5.1, Page 16	Is the state only looking for a vendor to work the specific dates listed for fall billing and spring billing, or is the state looking for a vendor to work year-round in the call center and ramp up staffing for the peak times? Asking for peak times referenced in the RFP (page 16, section 5.1) only.
Section 5.1, Page 16	Is the state open to receiving quotes for full-year service, including the ramp periods, that would allow direct state employees to focus on other high-importance tasks while the vendor manages the phones lines? Would want separate quotes, but yes, open to it.
Section 5.4, Page 17	What specific software used (e.g., ACD Platform, CRM, etc.) does ASU require a demo of? None
Attachment G, Page 20	Is not having audited financial statements a disqualifier? (Audited Financial Statements are required to ensure a vendor is in good Financial Standing - (If no audit within the past 18 months is available, explain the reason in the area provided on the document.)
Section 5.0 – Product Specifications and Scope of Work	Should agents respond only to high-level account questions or also address payment-related details? High level responses are what is needed as agents will not be able to see the student account in our ERP.

RFP Section / page #	Question
Section 5.0 – Product Specifications and Scope of Work	How should escalations be handled—warm transfer, scheduled callback, or ticket submission? Warm Transfer to 2nd Level support in our office.
Section 5.0 – Product Specifications and Scope of Work	Are there mandatory greeting scripts or compliance statements that must be followed? We provide recommended high-level scripts as a guide.
Section 5.0 – Product Specifications and Scope of Work	Does “All calls must remain domestic” mean calls must originate and terminate on U.S. numbers even if answered offshore? Calls must be answered domestically only.
Section 5.0 – Product Specifications and Scope of Work	Would using a U.S. DID number with cloud PBX routing to offshore agents and U.S.-based call recording storage be acceptable? No
Section 5.0 – Product Specifications and Scope of Work	Do you have a preferred telecom provider or should the vendor propose one? Vendor will provide and should include any costs in their quotes as we will only be paying the vendor, not additional third parties.
Section 5.0 – Product Specifications and Scope of Work	What is the maximum acceptable hold time under the SLA? 25 minutes
Section 5.0 – Product Specifications and Scope of Work	Should call recordings be stored exclusively on U.S.-based servers? Yes, and only for a limited period of time for quality control purposes only.
Section 5.0 – Product Specifications and Scope of Work	How much advance notice will you provide for exact peak call dates? Dates will normally be provided several days in advance, with the caveat that at times, communications from our office via email to the student/parent are required and cause increases in the number of calls that cannot be fully anticipated.
Section 5.0 – Product Specifications and Scope of Work	Do you require a dedicated team of agents or a shared resource pool? STRONGLY prefer a dedicated team of agents.
Section 5.0 – Product Specifications and Scope of Work	Are there specific accent, language, or communication style requirements? English required, prefer additional languages such as Spanish but not required. A professional response is the goal. No accent or other requirements.
Section 5.0 – Product Specifications and Scope of Work	How much notice will be given for scaling staffing up or down? Dates will normally be provided several days in advance, with the caveat that at times, communications from our office via email to the student/parent are required and cause increases in the number of calls that cannot be fully anticipated.
Section 5.0 – Product Specifications and Scope of Work	Will live or recorded training be provided before each activation period? We believe that after the first engagement that it won't be needed. These are high-level questions only. That said, we are willing to provide training prior to each engagement if the vendor finds this necessary.

RFP Section / page #	Question
Section 5.0 – Product Specifications and Scope of Work	Will agents have access to Ellucian Banner, or will they rely solely on reference materials? The vendor will not be able to integrate with AppState systems.
Section 5.0 – Product Specifications and Scope of Work	Can you provide sample FAQs or scripts from previous years? Provided in the RFP as “Call Center Guide Fall 2025”
Section 5.0 – Product Specifications and Scope of Work	What data fields should be included in the daily call log? Time created, Telephone number, First and last name, affiliation with the university, Reason for the call, Agent Actions, Was the call escalated, Agent Name
Section 5.0 – Product Specifications and Scope of Work	Do you require real-time call monitoring access for your supervisors? No
Section 5.0 – Product Specifications and Scope of Work	What SLA metrics must be met for answer rate, average speed of answer, and abandonment rate? Expectation of answer within 15 minutes, no longer than 25, with automated estimated wait times provided to the caller.
Section 5.0 – Product Specifications and Scope of Work	What is the preferred pricing model—per call, per minute, or dedicated FTE? While per call or flat rate is acceptable, we have found per FTE hour as the most common structure. That said as long as we can form a comparable pricing structure in comparing vendors, no pricing structure is disallowed.
Section 5.0 – Product Specifications and Scope of Work	Is there a guaranteed minimum call volume per activation period? There is not, however, if that is important to the vendor, we are happy to entertain that as part of the proposal.
Section 5.0 – Product Specifications and Scope of Work	What are the payment terms and will payments be in USD via bank transfer? Paid net 30 upon receipt of the Invoice, in USD via check or ACH.
Section 5.0 – Product Specifications and Scope of Work	Will the agreement be seasonal or multi-year? Seasonal, with one year renewal options. See RFP page 7 section 1.1 for details.
Section 5.0 – Product Specifications and Scope of Work	Will AppState share a sample Gantt chart or milestone plan as a reference? Not planned but can discuss if chosen.
Section 5.0 – Product Specifications and Scope of Work	Is a proof-of-concept phase acceptable before full implementation? No
Section 5.0 – Product Specifications and Scope of Work	What resources will AppState provide during implementation? A Call Center Guide with anticipated questions and responses will be provided. A zoom training for specific questions that are not answered in the call center guide can be arranged if needed.

RFP Section / page #	Question
Section 5.4 – Software Functionality	Will offshore agents be given demo access to the Ellucian Banner system for familiarization? Agents must be domestic, and no integration with Banner.
Section 5.4 – Software Functionality	Are there pre-built API connectors for Ellucian Banner, or will custom integration be required? No integration with Banner or other Appalachian State systems.
Section 5.4 – Software Functionality	Are there specific authentication methods or security protocols required for API use? No API will be used
	What is the previous company that was awarded this bid? This is a Bid - We do not disclose information on an incumbent Vendor, current costs, or budgets.
	How much was the last bid that was awarded? This is a Bid - We do not disclose information on an incumbent Vendor, current costs, or budgets.
	Is it mandatory to have 3 references, or if we have fewer, will it disqualify our company? Highly recommend 3 references, but unless the state requires 3, we can accept the RFP for review with fewer and a reason why they cannot provide 3.
	Is there an issue with employees working remote? No, but must be domestic.
	What software is the incumbent vendor using? This is a Bid - We do not disclose information on an incumbent Vendor, current costs or budgets.
	Will Appalachian State University provide the phone number to forward calls, or must the vendor supply it? Vendor will supply the phone number that our system will forward all of our calls to during the engagement period.
	Can you clarify expected daily call volumes for each high-volume period and provide historical call data by day? Expectation varies greatly based on the day. As low as 30 to as high as 200. More detailed information can be provided upon contract signing
	What is the target Service Level Agreement (SLA) for average hold time and call abandonment rate? Average hold time should be 15 minutes or less, maximum acceptable hold time is 25 minutes.
	Are there any specific call recording retention requirements? Call recordings are retained at the vendor for 90 days

RFP Section / page #	Question
	Will ASU provide the Call Center Guide in an editable format for vendor training purposes? We can, but we would have questions regarding the edits you would place.
	Will the vendor have direct access to ASU's systems (e.g., Ellucian Banner) for reference, or only to scripts and guides? No, scripts and guide only.
	Will calls be forwarded in real time only, or is there an option for voicemail-to-ticket processing? Real time, tickets could be opened if calls exceed capacity for callback.
	Can the daily call log format be customized, and how should it be transmitted (e.g., secure email, portal upload)? Yes, transmittal by vendor to Appstate. No set format, must agree prior to signing.
	Are there any data security compliance requirements beyond standard state/federal regulations (e.g., HIPAA, PCI)? FERPA, but the call center will only have access to non-directory information that the student provides. The vendor will not be integrated with AppState's ERP.