

**Appalachian State University**

**Request for Proposal #: 55-080323**

**Campus Services POS/Mobile ID/Campus Card**

**Date Issued: August 3, 2023**

**Proposal Opening Date: August 18, 2023**

**At 2:00 PM ET**

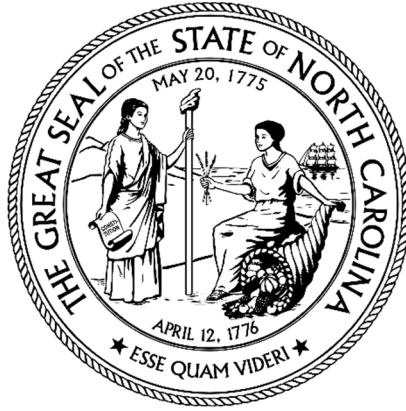
**Direct all inquiries concerning this RFP to:**

**Chad Hicks**

**Director of Materials Management**

**Email: [hicksce@appstate.edu](mailto:hicksce@appstate.edu)**

**Phone: 828-262-4004**



## STATE OF NORTH CAROLINA

### Request for Proposal #

**55-080323**

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For internal State agency processing, including tabulation of proposals, provide your company's eVP (Electronic Vendor Portal) Number. Pursuant to G.S. 132-1.10(b) this identification number shall not be released to the public. **This page will be removed and shredded, or otherwise kept confidential**, before the procurement file is made available for public inspection.

**This page shall be filled out and returned with your proposal.  
Failure to do so may subject your proposal to rejection.**

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Vendor Name

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Vendor eVP#

Note: For a contract to be awarded to you, your company (you) must be a North Carolina registered vendor in good standing. You must enter the vendor number assigned through eVP (Electronic Vendor Portal). If you do not have a vendor number, register at <https://vendor.ncgov.com/vendor/login>

Electronic responses ONLY will be accepted for this solicitation.

**STATE OF NORTH CAROLINA**  
**Appalachian State University**

Refer <u>ALL</u> Inquiries regarding this RFP to: <b>Chad Hicks</b> <a href="mailto:hicksce@appstate.edu">hicksce@appstate.edu</a> <b>Ph: 828-262-4004</b>	<b>Request for Proposal # 55-080323</b>	
	<b>Proposals will be publicly opened: August 18, 2023</b>	
<b>Using Agency:</b>	<b>Commodity No. and Description: Campus Services POS/Mobile</b>	
<b>Requisition No.:</b>	<b>ID/Campus Card</b>	

**EXECUTION**

In compliance with this Request for Proposal (RFP), and subject to all the conditions herein, the undersigned Vendor offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item within the time specified herein.

By executing this proposal, the undersigned Vendor understands that false certification is a Class I felony and certifies that:

- this proposal is submitted competitively and without collusion (G.S. 143-54),
- that none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and
- it is not an ineligible Vendor as set forth in G.S. 143-59.1.

Furthermore, by executing this proposal, the undersigned certifies to the best of Vendor's knowledge and belief, that:

- it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.

As required by G.S. 143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this RFP, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system.

As required by Executive Order 24 (2017), the undersigned vendor certifies will comply with all Federal and State requirements concerning fair employment and that it does not and will not discriminate, harass, or retaliate against any employee in connection with performance of any Contract arising from this solicitation.

G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public Contract; or awarding or administering public Contracts; or inspecting or supervising delivery of the public Contract of any gift from anyone with a Contract with the State, or from any person seeking to do business with the State. By execution of this response to the RFP, the undersigned certifies, for Vendor's entire organization and its employees or agents, that Vendor are not aware that any such gift has been offered, accepted, or promised by any employees or agents of Vendor's organization.

By executing this proposal, Vendor certifies that it has read and agreed to the **INSTRUCTION TO VENDORS** and the **NORTH CAROLINA GENERAL TERMS AND CONDITIONS incorporated herein**. These documents can be accessed from the ATTACHMENTS page within this document.

**Failure to execute/sign proposal prior to submittal may render proposal invalid and it MAY BE REJECTED. Late proposals cannot be accepted.**

COMPLETE/FORMAL NAME OF VENDOR:		
STREET ADDRESS:	P.O. BOX:	ZIP:
CITY & STATE & ZIP:	TELEPHONE NUMBER:	TOLL FREE TEL. NO:
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE (SEE INSTRUCTIONS TO VENDORS ITEM #21):		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR:	FAX NUMBER:	
VENDOR'S AUTHORIZED SIGNATURE:	DATE:	E-MAIL:

Proposal Number: 55-080323

Vendor: \_\_\_\_\_

**VALIDITY PERIOD**

Offer shall be valid for at least sixty (60) days from date of bid opening, unless otherwise stated here: \_\_\_\_\_ days, or if extended by mutual agreement of the parties in writing. Any withdrawal of this offer shall be made in writing, effective upon receipt by the agency issuing this RFP.

**ACCEPTANCE OF PROPOSAL**

If your proposal is accepted, all provisions of this RFP, along with the written results of any negotiations, shall constitute the written agreement between the parties ("Contract"). The NORTH CAROLINA GENERAL TERMS AND CONDITIONS are incorporated herein and shall apply. Depending upon the Goods or Services being offered, other terms and conditions may apply, as mutually agreed.

**FOR STATE USE ONLY:** Offer accepted and Contract awarded this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, as indicated on the attached certification, by \_\_\_\_\_  
**(Authorized Representative of Appalachian State University)**

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## 1.0 PURPOSE AND BACKGROUND

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Appalachian State University is home to over 20,000 FTE students and 3100 FTE employees. Campus Services serves the Appalachian State University community through the management of on-campus businesses including: Campus Dining, Conference and Event Services, Parking and Transportation, the University Bookstore, and the University Post Office.

With the exception of vending, Campus Dining is self-operating and manages 2 convenience stores, 3 staff less convenience stores, 2 all access locations, and 15 other retail venues across campus. They also partner with locally owned food truck vendors to bring a variety of options to campus. Approximately 6400 residential students have a meal plan. Please visit Campus Dining (<https://dining.appstate.edu/>) to view additional information about dining related locations and services.

Appalachian State University's Campus Services seeks to partner with a trusted vendor who is dedicated to improving the student experience and provides products with thoughtful and accessible design and contactless options. Campus Services is requesting qualified vendors to submit proposals for a multi-phase solution.

- Phase 1 includes the implementation of a unified point of sale system (POS) for all of Campus Dining venues and the University Post Office with a goal of December 1, 2023. An implementation timeline should be included in the proposal.
- Phase 2 is the implementation of a campus-wide ID card and credential solution with integrated capabilities. Capabilities should include but are not limited to: mobile credentialing, ID carding, online photo submission, meal plan management, retail and commerce, access and security, API data and transactional integration with third parties, and online card office. An implementation timeline should be included in the proposal.

Proposals shall be submitted in accordance with the terms and conditions of this RFQ and any addenda issued hereto.

## CONTRACT TERM

The Contract for each phase shall have an initial term of three (3) years, beginning on the date of final Contract execution (the "Effective Date"). At the end of each Contract's initial term, the State shall have the option, in its sole discretion, to renew the Contract on the same terms and conditions for up to two (2) additional one-year terms. The State will give the Vendor written notice of its intent to exercise each option no later than sixty (60) days before the end of the Contract's then-current term. In addition to any optional renewal terms, and with the Vendor's concurrence, the State reserves the right to extend the Contract after the last active term.

## 2.0 GENERAL INFORMATION

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### 2.1 REQUEST FOR PROPOSAL DOCUMENT

The RFP is comprised of the base RFP document, any attachments, and any addenda released before Contract award, which are incorporated herein by reference.

### 2.2 E-PROCUREMENT FEE

**ATTENTION: The E-Procurement fee may apply to this solicitation. See paragraph entitled ELECTRONIC PROCUREMENT of the North Carolina General Terms and Conditions.**

General information on the E-Procurement Services can be found at: <http://eprocurement.nc.gov/>.

### 2.3 NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS

It shall be the Vendor's responsibility to read the Instructions to Vendors, the North Carolina General Terms and Conditions, all relevant exhibits and attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Vendors also are responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP.

If Vendors have questions or issues, regarding any component within this RFP, those must be submitted as questions in accordance with the instructions in the PROPOSAL QUESTIONS Section. If the State determines that any changes will be made as a result of the questions asked, then such decisions will be communicated in the form of an RFP addendum. The State may also elect to leave open the possibility for later negotiation of specific provisions of the Contract that have been addressed during the question-and-answer period, prior to contract award.

Other than through the process of negotiation under 01 NCAC 05B.0503, the State rejects and will not be required to evaluate or consider any additional or modified terms and conditions submitted with Vendor’s proposal. This applies to any language appearing in or attached to the document as part of the Vendor’s proposal that purports to vary any terms and conditions or Vendors’ instructions herein or to render the proposal non-binding or subject to further negotiation. Vendor’s proposal shall constitute a firm offer that shall be held open for the period required herein (“Validity Period” above).

**The State may exercise its discretion to consider Vendor proposed modifications. By execution and delivery of this RFP Response, the Vendor agrees that any additional or modified terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect, and will be disregarded unless expressly agreed upon through negotiation and incorporated by way of a Best and Final Offer (BAFO) . Noncompliance with, or any attempt to alter or delete, this paragraph shall constitute sufficient grounds to reject Vendor’s proposal as nonresponsive.**

**2.5 RFP SCHEDULE**

The table below shows the *intended* schedule for this RFP. The State will make every effort to adhere to this schedule.

Event	Responsibility	Date and Time
Issue RFP	State	August 3, 2023
Submit Written Questions	Vendor	August 10, 2023, by 5 P.M. EST
Provide Responses to Questions	State	August 16, 2023, by 5 P.M. EST
Submit Proposals	Vendor	August 18, 2023, by 2 P.M. EST
Contract Award	State	August 31, 2023
Contract Effective Date	State	October 1, 2023 (or sooner if possible)

**2.6 PROPOSAL QUESTIONS**

Upon review of the RFP documents, Vendors may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the Proposal Questions process, Vendors shall submit any such questions by the “Submit Written Questions” date and time provided in the RFP SCHEDULE Section above, unless modified by Addendum.

Written questions shall be e-mailed to [hicksce@appstate.edu](mailto:hicksce@appstate.edu) by the date and time specified above. Vendors will enter “RFP #55-080323 Questions” as the subject for the email. Question submittals will include a reference to the applicable RFP section and be submitted in a format shown below:

Reference	Vendor Question
RFP Section, Page Number	Vendor question ...?

Questions received prior to the submission deadline date, the State’s response, and any additional terms deemed necessary by the State will be posted in the form of an addendum to **electronic Vendor Portal (eVP)**, <https://evp.nc.gov> and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any State personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Vendors shall rely *only* on written material contained in an Addendum to this RFP.

**2.8 PROPOSAL SUBMITTAL**

**IMPORTANT NOTE: This is an absolute requirement.** Late bids, regardless of cause, will not be opened or considered, and will be automatically disqualified from further consideration. Vendor shall bear the sole risk of late submission due to unintended or unanticipated delay. It is the Vendor’s sole responsibility to ensure its proposal has been received as described

in this RFP by the specified time and date of opening. The date and time of receipt will be marked on each proposal when received. Any proposal or portion thereof received after the proposal submission deadline will be rejected.

## eVP

If applicable to this RFP and using eVP, all proposal responses shall be submitted electronically via the electronic Vendor Portal (eVP). Additional information can be found at the eVP updates for Vendors link: <https://eprocurement.nc.gov/news-events/evp-updates-vendors>.

If confidential and proprietary information is included in the proposal, also submit one (1) signed, REDACTED copy of the proposal. Such information may include trade secrets defined by N.C. Gen. Stat. § 66-152 and other information exempted from the Public Records Act pursuant to N.C. Gen. Stat. §132- 1.2. Vendor may designate information, Products, Services or appropriate portions of its response as confidential, consistent with and to the extent permitted under the statutes and rules set forth above. By so redacting any page, or portion of a page, the Vendor warrants that it has formed a good faith opinion, having received such necessary or proper review by counsel and other knowledgeable advisors, that the portions determined to be confidential and proprietary and redacted as such, meet the requirements of the Rules and Statutes set forth above. However, under no circumstances shall price information be designated as confidential.

If the Vendor does not provide a redacted version of the proposal with its proposal submission, the Department may release an unredacted version if a record request is received.

Failure to submit a proposal in strict accordance with these instructions shall constitute sufficient cause to reject a Vendor's proposal(s). Vendors are strongly encouraged to allow sufficient time to upload proposals.

Critical updated information may be included in Addenda to this RFP. It is important that all Vendors responding on this RFP periodically check the State's eVP website for any Addenda that may be issued prior to the proposal opening date. All Vendors shall be deemed to have read and understood all information in this RFP and all Addenda thereto.

## 2.9 PROPOSAL CONTENTS

Vendors shall populate all attachments of this RFP that require the Vendor to provide information and include an authorized signature where requested. Failure to provide all required items, or Vendor's submission of incomplete items, may result in the State rejecting Vendor's proposal, in the State's sole discretion.

Vendor RFP responses shall include the following items and attachments, which shall be arranged in the following order:

- a) Cover Letter, which must contain the following: (i) a statement that confirms that the Vendor has read the RFP in its entirety, including all links, and all Addenda released in conjunction with the RFP, (ii) a statement that the Vendor agrees to perform in accordance with the scope of work, requirements, and specifications contained herein; and (iii) Vendor's agreement to comply with all instructions, terms and conditions, and attachments.
- b) Title Page: Include the company name, address, phone number and authorized representative along with the Proposal Number.
- c) Completed and signed version of EXECUTION PAGES, along with the body of the RFP.
- d) Signed receipt pages of any addenda released in conjunction with this RFP, if required to be returned.
- e) Vendor's Proposal addressing all Specifications of this RFP. *[Indicate relative section references as a guide to responding to sections requiring additional responses outside of the solicitation document. If not required, delete.]*
- f) Completed version of ATTACHMENT A: PRICING
- g) Completed version of ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION
- h) Completed version of ATTACHMENT E: CUSTOMER REFERENCE FORM
- i) Completed version of ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR

- j) Completed and signed version of ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION
- k) Completed and signed version of ATTACHMENT H: VENDOR REQUEST FOR EO50 PRICE-MATCHING, if applicable
- l) Completed and signed version of ATTACHMENT I: ACKNOWLEDGMENT OF COVID-19 VACCINATION AND TESTING POLICY, if applicable.
- m) Completed and signed version of CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS and OMB STANDARD FORM LLL

## **2.10 ALTERNATE PROPOSALS**

Unless provided otherwise in this RFP, Vendor may submit alternate proposals for comparable Goods, various methods or levels of Service(s), or that propose different options. Alternate proposals must specifically identify the RFP requirements and advantage(s) addressed by the alternate proposal. Any alternate proposal, in addition to the marking described above, must be clearly marked with the legend: "Alternate Proposal #55-071323 for 'name of Vendor'". Each proposal must be for a specific set of Goods and Services and must include specific pricing. If a Vendor chooses to respond with various offerings, each must be offered with a separate price and be contained in a separate proposal. Each proposal must be complete and independent of other proposals offered.

## **2.11 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS**

Relevant definitions for this RFP are provided in 01 NCAC 05A .0112 and in the Instructions to Vendors found below which are incorporated herein by this reference.

## **3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS**

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### **3.1 METHOD OF AWARD**

North Carolina G.S. 143-52 provides a general list of criteria the State shall use to award contracts, as supplemented by the additional criteria herein. The Goods or Services being procured shall dictate the application and order of criteria; however, all award decisions shall be in the State's best interest. All qualified proposals will be evaluated, and awards will be made to the Vendor(s) meeting the specific RFP Specifications and achieving the highest and best final evaluation, based on the criteria described below.

While the intent of this RFP is to award a Contract(s) to a single Vendor for all line items, the State reserves the right to make separate awards to different Vendors for one or more line items, to not award one or more line items or to cancel this RFP in its entirety without awarding a Contract, if it is considered to be most advantageous to the State to do so.

If a Vendor selected for award is determined by the State to be a non-resident of North Carolina, all responsive proposals will be reviewed to determine if any of them were submitted by a North Carolina resident Vendor who requested an opportunity to match the price of the winning proposal, pursuant to Executive Order #50 and G.S. 143-59 (for more information, please refer to ATTACHMENT H: VENDOR REQUEST FOR EXECUTIVE ORDER #50 PRICE MATCHING. If such proposals(s) are identified, the State will then determine whether any such proposal falls within the price-match range, and, if so, make a Contract award in accordance with the process that implements G.S. 143-59 and Executive Order #50.

The State reserves the right to waive any minor informality or technicality in proposals received.

### **3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION**

While this RFP is under evaluation, the responding Vendor, including any subcontractors and suppliers, is prohibited from engaging in conversations intended to influence the outcome of the evaluation. See the Paragraph 29 of the Instructions To Vendors entitled COMMUNICATIONS BY VENDORS.

Each Vendor submitting a proposal to this RFP, including its employees, agents, subcontractors, suppliers, subsidiaries and affiliates, is prohibited from having any communications with any person inside or outside the using agency; issuing agency; other government agency office or body (including the purchaser named above, any department secretary, agency head, members of the General Assembly and Governor’s office); or private entity, if the communication refers to the content of Vendor’s proposal or qualifications, the content of another Vendor’s proposal, another Vendor’s qualifications or ability to perform a resulting contract, and/or the transmittal of any other communication of information that could be reasonably considered to have the effect of directly or indirectly influencing the evaluation of proposals, the award of a contract, or both.

Any Vendor not in compliance with this provision shall be disqualified from evaluation and award. A Vendor’s proposal may be disqualified if its subcontractor and/or supplier engage in any of the foregoing communications during the time that the procurement is active (i.e., the issuance date of the procurement until the date of contract award or cancellation of the procurement). Only those discussions, communications or transmittals of information authorized or initiated by the issuing agency for this RFP or inquiries directed to the purchaser named in this RFP regarding requirements of the RFP (prior to proposal submission) or the status of the award (after submission) are excepted from this provision.

**3.3 PROPOSAL EVALUATION PROCESS**

Only responsive submissions will be evaluated.

**The State will conduct a One-Step evaluation of Proposals:**

Proposals will be received according to the method stated in the Proposal Submittal Section above.

All proposals must be received by the issuing agency not later than the date and time specified in the RFP SCHEDULE Section above, unless modified by Addendum. Vendors are cautioned that this is a request for offers, not an offer or request to contract, and the State reserves the unqualified right to reject any and all offers at any time if such rejection is deemed to be in the best interest of the State.

At the date and time provided in the RFP SCHEDULE Section above, unless modified by Addendum, the proposal from each responding Vendor will be opened publicly and all offers (except those that have been previously withdrawn, or voided bids) will be tabulated. The tabulation shall be made public at the time it is created. When negotiations after receipt of bids is authorized pursuant to G.S. 143-49 and 01 NCAC 05B.0503, only the names of offerors and the Goods and Services offered shall be tabulated at the time of opening. If negotiation is anticipated, cost and price shall become available for public inspection at the time of the award. Interested parties are cautioned that these costs and their components are subject to further evaluation for completeness and correctness and therefore may not be an exact indicator of a Vendor’s pricing position.

At their option, the evaluators may request oral presentations or discussions with any or all Vendors for clarification or to amplify the materials presented in any part of the proposal. Vendors are cautioned, however, that the evaluators are not required to request presentations or other clarification—and often do not. Therefore, all proposals should be complete and reflect the most favorable terms available from the Vendor.

The State reserves the right to negotiate with one or more vendors, or to reject all original offers and negotiate with one or more sources of supply that may be capable of satisfying the requirement, and in either case to require Vendor to submit a Best and Final Offer (BAFO) based on discussions and negotiations with the State.

**3.4 EVALUATION CRITERIA**

All qualified proposals will be evaluated, and award made based on considering the following criteria:

Criteria	Consideration Factors	Percentage
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Vendor Qualifications: Technical & Functional Capabilities and Quality of response	Proposed vendor solution adequately supports or exceeds the technical and functional requirements presented in the RFP; POS and credential solutions include features offered, flexibility, and expandability. Completeness, clarity, demonstration of understanding of scope, etc. Demonstration of competence and knowledge in the field and industry, availability of qualified staff, timeline that meets University needs, etc.	55%
Cost	Annual licensing & support costs, onsite installation and training, annual cost of operations, etc.	15%
Vendor reputation, experience & references	Reputation & experience in Higher Education, qualifications of personnel and/or sub-contractors, and stability. Adequate references of comparable scope and scale, higher education references, quality of references and recommendations, etc.	30%

**3.5 PERFORMANCE OUTSIDE THE UNITED STATES**

Vendor shall complete ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR. In addition to any other evaluation criteria identified in this RFP, the State may also consider, for purposes of evaluating proposed or actual contract performance outside of the United States, how that performance may affect the following factors to ensure that any award will be in the best interest of the State:

- a) Total cost to the State
- b) Level of quality provided by the Vendor
- c) Process and performance capability across multiple jurisdictions
- d) Protection of the State’s information and intellectual property
- e) Availability of pertinent skills
- f) Ability to understand the State’s business requirements and internal operational culture
- g) Particular risk factors such as the security of the State’s information technology
- h) Relations with citizens and employees
- i) Contract enforcement jurisdictional issues

**3.6 INTERPRETATION OF TERMS AND PHRASES**

This RFP serves two functions: (1) to advise potential Vendors of the parameters of the solution being sought by the State; and (2) to provide (together with other specified documents) the terms of the Contract resulting from this procurement. The use of phrases such as “shall,” “must,” and “requirements” are intended to create enforceable contract conditions. In determining whether proposals should be evaluated or rejected, the State will take into consideration the degree to which Vendors have proposed or failed to propose solutions that will satisfy the State’s needs as described in the RFP. Except as specifically stated in the RFP, no one requirement shall automatically disqualify a Vendor from consideration. However, failure to comply with any single requirement may result in the State exercising its discretion to reject a proposal in its entirety.

**4.0 REQUIREMENTS**

This Section lists the requirements related to this RFP. By submitting a proposal, the Vendor agrees to meet all stated requirements in this Section, as well as any other specifications, requirements, and terms and conditions stated in this RFP. If a Vendor is unclear about a requirement or specification, or believes a change in a requirement would allow for the State to

receive a better proposal, the Vendor is encouraged to submit these items in the form of a question during the question-and-answer period in accordance with the Proposal Questions Section above.

**4.1 PRICING**

Proposal price shall constitute the total cost to the State for complete performance in accordance with the requirements and specifications herein, including all applicable charges for handling, transportation, administrative and other similar fees. Complete ATTACHMENT A: PRICING FORM and include in Vendor’s proposal.

PRICING FORM, shall include:

A) Summary sheet that provides a breakdown of Phase 1 and Phase 2:

- Total cost for the proposed system
- On-site installation and training program costs
- Summation of year two through year three and subsequent 1-year term costs including anticipated costs of upgrades.

B) Detailed Breakdown of the proposed system hardware and software components, including description and quantity of component, unit and extended pricing of Phase 1 and Phase 2:

- Licenses
- Hardware (POS terminals, controllers, etc.)
- Readers and Related Peripheral Equipment and Components
- Estimated Service Costs, including proposed software and hardware training
- Installation of controllers and readers
- Professional Services for implementation of Phase 1
- Professional Services for implementation of Phase 2
- Optional Items (provide unit pricing unless otherwise indicated)

**4.2 TRANSPORTATION AND IDENTIFICATION**

The Vendor shall deliver Free-On-Board (FOB) Destination to any requested location within the State of North Carolina with all transportation costs and fees included in the total proposal price.

When an order is placed using a purchase order, the purchase order number shall be shown on all packages and shipping manifests to ensure proper identification and payment of invoices. If an order is placed without using a purchase order, such as via phone, the Buyer’s name shall be shown on all packages. A complete packing list shall accompany each shipment. Vendors shall not ship any products until they have received an order.

**4.3 DELIVERY AND INSTALLATION**

The Vendor shall deliver Free-On-Board (FOB) Destination to the following location(s):

For completion by Vendor: Delivery will be made from \_\_\_\_\_ (city, state) within \_\_\_\_\_ consecutive calendar days after receipt of purchase order. Promptness of delivery may be used as a factor in the award criteria.

Delivery shall not be considered to have occurred until installation has been completed. Upon completion of the installation, the Vendor shall remove and properly dispose of all waste and debris from the installation site. The Vendor shall be responsible for leaving the installation area clean and ready to use.

**4.4 AUTHORIZED RESELLER**

The Vendor shall be authorized by the manufacturer to distribute or resell the products and/or maintenance offered in this RFP. The Vendor shall provide a signed statement from the manufacturer confirming authorization with its proposal

response. Failure to provide this statement shall constitute sufficient grounds for rejection of Vendor’s offer, at the discretion of the State.

Vendor is the:  Manufacturer  Dealer  Reseller  Distributor

Authorized:  Yes  No Attached Manufacturer’s Authority:  Yes  No

**4.5 WARRANTY**

Manufacturer’s standard warranty shall apply. Vendors shall include a copy of the manufacturer’s standard warranty with the proposal response.

Vendor warrants that all equipment furnished under this RFP will be newly manufactured, of good material and workmanship. The warranty will apply from date equipment is put into operation for a minimum period of twelve (12) months or the length of the manufacturer’s warranty, whichever is longer. Such warranty shall cover the cost of all defective parts replacement, labor, freight, and technicians’ travel at no additional cost to the State, or as specified by the Purchasing Agency herein. To the extent not superseded by the terms of this paragraph, manufacturer’s warranty terms shall apply. Vendor’s warranty shall be at least the level of coverage provided for its comparable customers.

The report of a problem does not presuppose that every call must result in an “on-site” visit for service/repair. The Vendor and/or service sub-contractor shall utilize best efforts to resolve problems in a timely fashion by using acceptable servicing methods to include, but not limited to, verbal problem analysis and remote diagnosis. The warranty requirement does not impose any additional duty on the State to make other than normal and good faith problem resolution efforts or expenditures of time. Vendor shall be responsible for compliance with warranty terms by any third-party service provider. Vendor shall provide contact information for warranty service provider, below.

Vendor is authorized by manufacturer to repair equipment offered during the warranty period?  YES  NO

Will the Vendor provide warranty service?  YES  NO, a manufacturer-authorized third party will perform warranty service.

Contact information for warranty service provider:

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

\_\_\_\_\_

Contact Person (name): \_\_\_\_\_

Contact Person (phone number): \_\_\_\_\_

Contact Person (email): \_\_\_\_\_

**4.6 DESCRIPTIVE LITERATURE**

**DESCRIPTIVE LITERATURE/CERTIFICATION**

Each proposal shall be accompanied by complete descriptive literature, specifications, certifications, and all other pertinent data necessary for thorough evaluation of the item(s) offered and sufficient to determine compliance of the item(s) with the specifications. Failure to include such information shall be a sufficient basis for rejection of the proposal.

**4.7 HUB PARTICIPATION**

Pursuant to North Carolina General Statute G.S. 143-48, it is State policy to encourage and promote the use of small, minority, physically handicapped, and women contractors in purchasing Goods and Services. As such, this RFP will serve to identify those Vendors that are minority owned or have a strategic plan to support the State’s Historically Underutilized Business program by meeting or exceeding the goal of 10% utilization of diverse firms as 1st or 2nd tier subcontractors. Vendor shall complete ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION.

#### **4.8 VENDOR EXPERIENCE**

In its Proposal, Vendor shall demonstrate experience with public and/or private sector clients with similar or greater size and complexity to the State. Vendor shall provide information as to the qualifications and experience of all executive, managerial, legal, and professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person.

Vendor shall also provide information about the Vendor's background and experience in developing, supplying and maintaining the systems sought in this RFP in responses to the Vendor Questions.

#### **4.9 REFERENCES**

Vendors shall provide at least three (3) references, using ATTACHMENT E: CUSTOMER REFERENCE FORM, for which your company has supplied the exact model of equipment offered. The State may contact these users to determine quality level of the offered equipment; as well as, but not limited to user satisfaction with Vendor performance. Information obtained may be considered in the evaluation of the proposal.

The Vendor must be able to demonstrate an established, successful track record of past performance in providing products and services closely related to the requirements specified in this RFP. Appalachian State University reserves the right to visit a Vendor site, at University's expense, to witness a functional demonstration of the proposed system and peripheral devices.

Please reference accounts/installations, showing company experience in receiving contracts for the delivery of campus-wide commerce and POS management systems, like the one proposed, to other college and/or university clients. At a minimum, the reference accounts must be using the Vendor's proposed system(s) supporting campus-wide POS solutions. Reference information should include the college/university name, address, name of contact person and his/her title, email address, and telephone number.

#### **4.10 VENDOR'S REPRESENTATIONS**

If the proposal results in an award, Vendor agrees that it will not enter any agreement with a third party that may abridge any rights of the State under the Contract. If any Services, deliverables, functions, or responsibilities not specifically described in this solicitation are required for Vendor's proper performance, provision and delivery of the Service and deliverables under a resulting Contract, or are an inherent part of or necessary sub-task included within such service, they will be deemed to be implied by and included within the scope of the contract to the same extent and in the same manner as if specifically described in the Contract. Unless otherwise expressly provided herein, Vendor will furnish all of its own necessary management, supervision, labor, facilities, furniture, computer and telecommunications equipment, software, supplies and materials necessary for the Vendor to provide and deliver the Services and/or other Deliverables.

#### **4.11 QUESTIONS TO VENDORS**

Vendor shall respond to each of the following questions. Vendors are requested to keep responses concise and relevant and should not include generic marketing materials. Responses will be reviewed as part of the evaluation process.

#### **4.12 FINANCIAL STABILITY**

As a condition of contract award, the Vendor must certify that it has the financial capacity to perform and to continue to perform its obligations under the Contract; that Vendor has no constructive or actual knowledge of an actual or potential legal proceeding being brought against Vendor that could materially adversely affect performance of this Contract; and that entering into this Contract is not prohibited by any contract, or order by any court of competent jurisdiction

Each Vendor shall certify it is financially stable by completing the ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION. The State is requiring this certification to minimize potential performance issues from Contracting with a Vendor that is financially unstable. This Certification shall be deemed continuing, and from the date of the Certification to the expiration of the Contract, the Vendor shall notify the State within thirty (30) days of any occurrence or condition that materially alters the truth of any statement made in this Certification.



## 5.0 PRODUCT SPECIFICATIONS AND SCOPE OF WORK

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### 5.1 Specifications

Proposals must be organized in the order presented in this RFP and include a quotation which is based on the system information provided. Proposals not organized in the prescribed manner may be eliminated from consideration. The Vendor must respond to all the items listed in the RFP in order using the numbering system of this RFP. Responses should be complete, comprehensive, and concise. Vendors are requested to complete a Vendor Detailed Questionnaire (Attachment I). Any single response in the Vendor Detailed Questionnaire should not exceed 450 words. Supplemental technical information, product literature and other supporting materials that further explain or demonstrate the proposed system capabilities may also be included in the proposal response separate from the questionnaire. If a question in the Vendor Detailed Questionnaire asks for an attachment or documentation, please affirm that the information has been included in the proposal and reference where it can be located.

All Vendors who provide a proposal in response to this RFP are responsible for all costs associated with preparing that proposal, answering all questions, providing Appalachian State University with requested information, and making a Vendor presentation to Appalachian State University. Appalachian State University is under no obligation to incur or reimburse any Vendor for any proposal costs.

### POINT OF SALE (POS) SYSTEM REQUIREMENTS

#### A. Overview and Hardware

The POS hardware must meet the following criteria:

1. Support a variety of hardware options ranging from a full-size POS terminal to a small footprint device with the ability to operate a cash drawer;
2. Touch screen system with customer display;
3. An integrated mag-stripe reader for closed loop card usage;
4. Support a variety of barcode scanners and other peripheral devices;
5. Integration with PCI P2PE validated payment solution and NFC payment options via cards and mobile devices;
6. Read item barcodes from 1D & 2D readers;
7. Support scales for weighted items;
8. Manage dual cash drawers that maintain cashier accountability;
9. Interface with kitchen display systems & remote kitchen printers.

#### B. User Interface

1. System should allow for discounts or premiums based on specific items purchased, category of items, tender key selected, or cashier entry.
2. System should allow for multiple menus and custom screen layouts.
3. System should provide the ability to establish pre-determined operator prompts associated with the sale of specific items or groups of items.
4. POS equipment should support dual cash drawers and/or dual operator log-on.
5. The cashier should be able to process a refund for any tender type. The system should also be able to prohibit this function.
6. Receipt printing should be customizable (i.e., only print when total paid is over a certain dollar amount or only for credit card transactions requiring a signature).
7. The receipt should include the ability to print a custom header message and/or custom logo to specify the specific revenue center/service area.
8. POS should contain a training mode.
9. System should allow configurable offline transaction storage and support the automatic uploading of transactions when connectivity is restored without operator intervention.

#### C. Back Office Software

1. The system should allow for real-time POS monitoring of transaction activity and sales.

2. The system should allow for assigning discounts or premiums to individual products or tender keys. Options should also include support of combination pricing.
3. System should have the ability to set sales on items or groups of items to start and end on specified dates.
4. System should have the ability to create multiple tender types.
5. System should allow users to add new products to a menu at an administrative computer (PC) and at the POS.
6. System should be able to handle multiple menus.

**D. Reports and Analytics**

Reporting and analytics should include sales reports, inventory reports, sales trends, employee performance, and customizable reporting options. Sales reports need to be able to be broken out by day part and in 15 minute increments. Options should include SKU level reporting detail. Itemized receipts should be retrievable from at least a supervisor user profile.

**E. Operating System, Integration and Support**

1. The POS system should allow for integration with multiple software systems. Current integrations are listed below. Server and end point devices will need to be running on the most current operating system available.
2. Technical support services must include 24-hour phone or email support, software updates, bug fixes, and timely customer response.

<b>Current Integration</b>	<b>Function</b>
GrubHub	Mobile Ordering
Freedom Pay	Credit card processing
FSS	Inventory Tracking
Atrium / JSA	AppCard Office for deposits to accounts and plans in CS Gold.
uGryd	Campus vending credit card transactions
NetSuite	Bookstore payments using the AppCard
Mobile Reader App	Mobile Reader App that we use in I pads for transactions and several places on Campus. Pharmacy, Student Accounts, Meal Plan scans at the gates and the Convocation Center.
SmartLocker	University Post Office pick up
Entrust DataCard Instant ID	Card production and online photo submission
CS Gold 8	CBORD ID card system
Ellucian Banner	Student Information System
PaperCut	PaperCut beginning Summer 2023, CBORD gateway license

**F. Security / PCI Requirements**

- Security must include user access controls, encryption of sensitive data, compliance with Payment Card Industry Data Security Standard (PCI DSS), and measures to prevent data breaches.
- Validated point to point encryption (P2PE®)
- Appalachian State University must be the Merchant of Record.
- Bidder’s software must be compatible with FIServ. We cannot and will not change merchant services providers due to existing State Contracts.
- Contract between Bidder and Appalachian State University will have the following requirements:
  - Contract must contain information about which PCI DSS requirements are managed by each service provider, and which are managed by the entity.
  - Contract must contain an incident response plan to be implemented in the event of system breach.

- Contract requires the service provider to provide annually on the date of contract a PCI DSS Service Provider Attestation of Compliance (AOC) listing their organization as the Service Provider. The AOC must cover the services provided to the University.

G. Online & Mobile Ordering

The solution should have a mobile ordering functionality with a preference for integration with Grubhub.

**5.1.2 CAMPUS CARD SYSTEM & ACCESS MANAGEMENT**

Phase 2 is the implementation of a campus-wide ID card and credential solution with integrated capabilities for access management. Capabilities should include but are not limited to: mobile credentialing, ID carding, online photo submission, meal plan management, retail and commerce, access and security, API data and transactional integration with third parties, and online card office.

**5.1.3 CARD REQUIREMENTS**

A. Campus Card Application and Interface

Appalachian State University seeks integrated application software to enable the transaction system to support the following card applications. Please note these are the applications currently in use that would need a solution or integration.

1. Card Production to include browser-based software and online photo submission (currently using Entrust DataCard Instant ID)
2. Dining Services to include POS, tablet, kiosk, and mobile ordering
3. Health Services/Pharmacy (currently using Medcat)
4. Library Usage
5. Access Control, (currently using CS Gold 8/MorphoManager/Idemia)
  - Campus Dining
  - Athletics
  - Building access
  - Integrate with Identity Governance Administration Tool
  - Vending Services
6. Laundry Services (not currently in use but may be in the future)
7. Copy Services (currently using PaperCut)
8. Print Management Services (currently using PaperCut)
9. Online Cardholder Service Center
10. Bookstore (currently using NetSuite)
11. Recreation Facilities (currently using Fusion)
12. Event and Activity Support/Check In/Booking Systems (currently using Engage)
13. Ticketing (BlueFin and Paciolan)
14. Marketing & Communications Service
15. Ability to integrate with homegrown systems

B. Software Interface

The proposed system must include a solution for inter-system integration, including reporting.

C. Administrative Needs

The solution must include the ability to identify users by a unique identifier and allow for at least 3 levels of permissions (general, admin, and supervisor). We must be able to segment out at least nine different revenue centers.

D. Credential Production Software

The proposed system must include an import/export utility. If mobile credentials are required, there must also be a card option (camps/conferences/etc.). The mobile credentialing must be enabled on an Android or iOS or watchOS. The system must have a solution for web-based credentialing.

**E. Access Control Software**

Appalachian State University seeks an integrated access management system. Please note these are the current access management applications in use that would need a solution or integration.

- Magnetic stripe readers (65%)
- Smart Technology readers (27%)
- Smart Technology with Keypad readers (8%) Schlage Multi-Tech - mag stripe and smart technology and can require dual authentication with a PIN
- Morpho Manager (9) for Athletics access to North End Zone - 6 + 3 Extreme (Biometric - has raised some student concerns)
- Hand Wave technology for All You Can Eat. Most students enrolled and we provide an alternative option (Biometric - has raised some student concerns)
- CBORD Mobile ID - a small set of people using
- Cellular readers on vending machines
- Master Controllers: Squadron (older and majority of campus), Mercury (newer part of Summer 2023 upgrade)
- Integration with door control technologies (e.g. door openers, door position sensors, motion sensors, ADA controls, Horns, request to exit)
- Access control for virtual or monitored alarm doors, elevator button - floor button control

**F. Access Control Hardware**

Proposed system should support the newest technologies, for example Access Controllers; Open Supervised Device Protocol (OSDP) or advancing technology.

Current hardware used throughout campus, and off-campus consists mainly of Mercury MR-5 readers (175), Schlage MTMSK15 readers (22), MTMS15 readers (82), A1005 readers (3), and V1000, V2000 Squadron Masters (91), and V100, V200, V300 Squadron Connectors (189), but also includes Idemia MorphoWAVE IP65 Rated with Prox/iClass/Mifare/Desfire Card Readers and 31 Micros points of sale units are in place in various campus locations. There are other areas of campus that use alternative access control systems that may seek to migrate to a new enterprise system.

Appalachian has a graduated plan to replace controllers. Proposed system must support Mercury boards (e.g. LP 4502, MR52, MR16 IN, MR16OUT).

**5.2 TECHNICAL APPROACH**

Vendor’s proposal shall include, in narrative, outline, and/or graph form the Vendor's approach to providing the deliverables outlined in the Scope of Work section of this RFP. A description of each task and deliverable and the schedule for accomplishing each shall be included.

**5.3 CERTIFICATION AND SAFETY LABELS**

All manufactured items and/or fabricated assemblies subject to operation under pressure, operation by connection to an electric source, or operation involving a connection to a manufactured, natural, or LP gas source shall be constructed and approved in a manner acceptable to the appropriate state inspector which customarily requires the label or re-examination listing or identification marking of the appropriate safety standard organization; such as the American Society of Mechanical Engineers for pressure vessels; the Underwriters Laboratories and /or National Electrical Manufacturers’ Association for electrically operated assemblies; or the American Gas Association for gas operated assemblies, where such approvals of listings have been established for the type of device offered and furnished. Further, all items furnished shall meet all requirements of the Occupational Safety and Health Act (OSHA), and state and federal requirements relating to clean air and water pollution.

**6.0 CONTRACT ADMINISTRATION**

All Contract Administration requirements are conditioned on an award resulting from this solicitation. This information is provided for the Vendor’s planning purposes. **6.1 CONTRACT MANAGER AND CUSTOMER SERVICE**

The Vendor shall be required to designate and make available to the State a contract manager. The contract manager shall be the State’s point of contact for Contract related issues and issues concerning performance, progress review, scheduling, and service.

<b>Contract Manager Point of Contact</b>	
Name:	
Office Phone #:	
Mobile Phone #:	
Email:	

**6.2 POST AWARD PROJECT REVIEW MEETINGS**

The Vendor, at the request of the State, shall be required to meet periodically monthly with the State for Project Review meetings. The purpose of these meetings will be to review project progress reports, discuss Vendor and State performance, address outstanding issues, review problem resolution, provide direction, evaluate continuous improvement and cost saving ideas, and discuss any other pertinent topics.

**6.3 CONTINUOUS IMPROVEMENT**

The State encourages the Vendor to identify opportunities to reduce the total cost to the State. A continuous improvement effort consisting of various ideas to enhance business efficiencies as performance progresses.

**6.4 ACCEPTANCE OF WORK**

Performance of the work and delivery of Goods shall be conducted and completed at least in accordance with the Contract requirements and recognized and customarily accepted industry practices. Performance shall be considered complete when the Services or Goods are approved as acceptable by the Contract Administrator.

**6.6 INVOICES**

Vendor shall invoice the Purchasing Agency. The standard format for invoicing shall be Single Invoices meaning that the Vendor shall provide the Purchasing Agency with an invoice for each order. Invoices shall include detailed line-item information to allow Purchasing Agency to verify pricing at point of receipt matches the correct price from the original date of order. At a minimum, the following fields shall be included on all invoices:

Vendor’s Billing Address, Customer Account Number, NC Contract Number, Order Date, Buyer’s Order Number, Manufacturer Part Numbers, Vendor Part Numbers, Item Descriptions, Price, Quantity, and Unit of Measure.

**INVOICES MAY NOT BE PAID UNTIL AN INSPECTION HAS OCCURRED AND THE GOODS ACCEPTED.**

**6.7 DISPUTE RESOLUTION**

During the performance of the Contract, the Parties agree that it is in their mutual interest to resolve disputes informally. Any claims by the Vendor shall be submitted in writing to the State’s Contract Manager for resolution. Any claims by the State shall be submitted in writing to the Vendor’s Project Manager for resolution. The Parties shall agree to negotiate in good faith and use all reasonable efforts to resolve such dispute(s).

During the time the Parties are attempting to resolve any dispute, each shall proceed diligently to perform their respective duties and responsibilities under this Contract. The Parties will agree on a reasonable amount of time to resolve a dispute. If a dispute cannot be resolved between the Parties within the agreed upon period, either Party may elect to exercise any other remedies available under the Contract, or at law. This provision, when agreed in the Contract, shall not constitute an agreement by either party to mediate or arbitrate any dispute.

## **6.8 CONTRACT CHANGES**

Contract changes, if any, over the life of the Contract shall be implemented by contract amendments agreed to in writing by the State and Vendor.

**The remainder of this page is intentionally left blank**

## 7.0 ATTACHMENTS

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### **\*\*IMPORTANT NOTICE\*\***

#### **RETURN THE REQUIRED ATTACHMENTS WITH YOUR RESPONSE**

FOLLOW THE LINKS TO ACCESS EACH ATTACHMENT

#### **ATTACHMENT A: COST PROPOSAL**

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Vendors are requested to organize quotations in the following format:

A) Summary sheet that provides a breakdown of:

- Total cost for the proposed system
- On-site installation and training program costs
- Summation of Year Two through Year Five costs

B) Detailed Breakdown of the proposed system hardware and software components, including description and quantity of component, unit and extended pricing:

- Licenses
- Hardware (POS terminals, controllers, etc.)
- Readers and Related Peripheral Equipment and Components
- Estimated Service Costs, including proposed software and hardware training and costs for any upgrades
- Installation of controllers and readers
- Optional Items (provide unit pricing unless otherwise indicated)

#### **ATTACHMENT B: INSTRUCTIONS TO VENDORS**

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The Instructions to Vendors, which are incorporated herein by this reference, may be found here:

<https://ncadmin.nc.gov/formnorth-carolina-instructions-vendors032023/download?attachment>

#### **ATTACHMENT C: NORTH CAROLINA GENERAL TERMS & CONDITIONS**

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The North Carolina General Terms and Conditions, which are incorporated herein by this reference, may be found here:

[https://files.nc.gov/ncdoa/pandc/OnlineForms/Form\\_North-Carolina-General-Terms-and-Conditions\\_11.2021.pdf](https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_North-Carolina-General-Terms-and-Conditions_11.2021.pdf)

#### **ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION**

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Complete and return the Historically Underutilized Businesses (HUB) Vendor Information form, which can be found at the following link:

[https://files.nc.gov/ncdoa/pandc/OnlineForms/Form\\_HUB-Supplemental-Vendor-Information\\_9.2021.pdf](https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_HUB-Supplemental-Vendor-Information_9.2021.pdf)

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**ATTACHMENT E: CUSTOMER REFERENCE FORM**

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Complete and return the Customer Reference Form, which can be found at the following link:

[https://files.nc.gov/ncdoa/pandc/OnlineForms/Form\\_Customer\\_Reference\\_Template\\_09.2021.pdf](https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_Customer_Reference_Template_09.2021.pdf)

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**ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR**

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Complete and return the Location of Workers Utilized by Vendor, which can be found at the following link:

[https://files.nc.gov/ncdoa/pandc/OnlineForms/Form\\_Location-of-Workers\\_09.2021.pdf](https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_Location-of-Workers_09.2021.pdf)

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**ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION**

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Complete, sign, and return the Certification of Financial Condition, which can be found at the following link:

[https://files.nc.gov/ncdoa/pandc/OnlineForms/Form\\_Certification-of-Financial-Condition\\_09.2021.pdf](https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_Certification-of-Financial-Condition_09.2021.pdf)

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**ATTACHMENT H: VENDOR REQUEST FOR EO50 PRICE-MATCHING**

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Complete, sign, and return the Vendor Request for EO50 Price-Matching, which can be found at the following link:

[https://files.nc.gov/ncdoa/pandc/OnlineForms/Form\\_Vendor-Price-Matching-Opportunity\\_09.2021.pdf](https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_Vendor-Price-Matching-Opportunity_09.2021.pdf)

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**ATTACHMENT I: VENDOR DETAILED QUESTIONNAIRE**

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Vendors are requested to complete a Vendor Detailed Questionnaire. Any single response in the Vendor Detailed Questionnaire should not exceed 450 words. Supplemental technical information, product literature and other supporting materials that further explain or demonstrate the proposed system capabilities may also be included in the proposal response separate from the questionnaire. Vendors who prefer to complete a sheet version of the questionnaire can email [cresnt@appstate.edu](mailto:cresnt@appstate.edu).

**\*\*\* Failure to Return the Required Attachments May Eliminate  
Your Response from Further Consideration \*\*\***

**ATTACHMENT I: VENDOR DETAILED QUESTIONNAIRE**

1	Provide a detailed breakdown of costs for Phase 1 and Phase 2 (Attachment A)
2	Refer to our access control hardware inventory in 5.1.3, please provide specific costs to replace or upgrade per item (e.g. reader, panel, etc.) based on your access control solution.
3	Describe your company's background and experience in developing, supplying and maintaining the following to colleges and universities: one card transaction systems, mobile credential in Apple Wallet and Android including utilization data, and online and real-time POS solutions, including, but not limited to tablet, kiosk, mobile ordering, EMV P2P encryption.
4	Provide an overview of your POS system and describe the features and specifications of each device.
5	Describe the project implementation team for the POS system including roles and typical amounts of experience.
6	Provide a high-level plan including an implementation timeline for the POS system.
7	How long ago was the proposed system released? What is the typical life cycle (in years) for POS hardware supported by the system?
8	How is the back office accessed – is it via web browser or an application that is installed on a computer?
9	Describe supported POS equipment that can be used outdoors. Provide information about any available mobile/handheld device options.
10	Describe other hardware available such as kiosks, deposit payment terminals, etc.
11	Describe the user interface and user experience for the POS system, including ease of use, intuitive navigation, accessibility, and customization options.
12	Does your POS system allow for conversational ordering to allow workstation operators to manually add or remove items to an order no particular sequence?
13	Describe information that can be included on the receipt and options for providing receipt.
14	Describe the system’s ability to handle multiple tax rates.
15	Describe how the system manages offline transactions and uploading of transactions when connectivity is restored.
16	Does your back-office system reside in the cloud or is it deployed on a server that resides on-site? Describe your POS network architecture.
17	Describe the POS system user access controls, encryption of sensitive data, compliance with Payment Card Industry Data Security Standard (PCI DSS), and measures to prevent data breaches.
18	Describe how the system controls user access permissions across multiple departments and venues.
19	Describe how both back office and POS terminal software is updated and schedule for upgrades.
20	Describe the ability to manage meal plans. Can you automate the setup of meal plans? Do you have a method to exclude students from eating at specified locations?
21	Does your POS support the ability for cascade tenders?
22	Describe the system’s ability to import data.
23	Describe any limitations on the number of menus, products, tender keys, etc.
24	Describe how/when a menu change goes into effect.
25	Describe the system’s ability for working with barcodes. What barcode formats does the system support?
26	Please describe any tools and/or features that will assist management with monitoring or controlling individual cashier’s use of refund, void or other functions that could be used to commit cashier fraud.
27	Does the system have any administrative tools that can be accessed from a mobile device?
28	Describe the reporting capabilities of the system. Provide a list of standard reports.
29	What reports are available that might alert the University to problems with internal security or fraud?
30	Explain ability to schedule reports. Can reports be directed to any printer, e-mail address, or exported in an Excel or comma separated file format?

31	Describe the system’s capability to import and export data and the format types supported (e.g. PDF, Excel, csv, etc.).
32	How does the proposed system handle credit and debit card payment processing?
33	Can the POS terminal software display a cardholder’s photo and/or other information retrieved from the campus transaction system?
34	Describe the ability to support and integrate with the POS associated applications listed in 5.1.1.E.
35	Describe the System’s ability to apply tax rates, discounts and premiums based upon customer status.
36	Describe technical support services for your system and how you ensure a timely response to customer requests. Please report your Service Level Agreements (SLAs) with your system and processes for software updates and bug fixes.
37	Describe how the system supports online and/or mobile ordering.
38	Is the online/mobile ordering system tightly integrated with the POS solution or is it a separate offering? Is the KDS used for walk-up transactions leveraged also for mobile orders? Or do you need separate hardware?
39	Are all multiple payment methods including board plans, stored value, cash and credit cards supported by both the POS and mobile ordering?
40	Does your mobile ordering solution support the ability for cascade tenders?
41	What are the options for authenticating users? Do you support Single Sign On / SAML2?
42	What notification options are available to inform customers that their orders are ready for pick up?
43	Does the solution offer any special features such as loyalty, incentives and promotions?
44	If your solution has a mobile app, does it support both iOS & Android? Can it accept Apple Pay?
45	Any ecommerce environment must allow Appalachian State University to be an SAQ A v4.0 merchant. Please provide the following documentation for review: PCI DSS Attestation of Compliance (preferably signed by a QSA); Dataflow Diagrams (both Face to Face and eCommerce); HECVAT; Responsibility Matrix; Connectivity Requirements; Hardware Make, Model, Firmware, and PCI-DSS expiry date.
46	Do you have a successfully working access control system for a University our size? If so, please provide an example.
47	Is the access control system open source or proprietary?
48	Provide a high-level plan for implementing a gradual transition of access management equipment with a migration and implementation timeline.
49	Describe the access control system's offline capabilities?
50	Does the access control system work with BIO reader?
51	Does access control system integrate successfully with ADA Door control locations? For example: Integrate with door openers, door position sensors, motion sensors, ADA buttons, request to exit.
52	Does the access control system support alarms and monitoring?
53	Does the access control system support schedules and calendars?
54	Does access control support virtual doors and elevators button control?
55	Does access control support wireless technology base - supported devices (gateways)?
56	Does system support stand-alone offline readers and real time wireless readers?

57	Does the wireless access control system support mobile readers?
58	Does the access control system support OSDP (Open Supervised Device Protocol)?
59	What is your success rate in transitioning a system with existing Squadron panels? Please share examples.
60	Please describe the access control system training process. Is this considered an additional expense or part of implementation costs?
61	Would the access control system training be provided by the credential-provider or through a 3rd party vendor?
62	Is your mobile credential leveraging secure sector NFC or using an app to select reader and/or location?
63	Is your mobile credential approved by Apple and working in the iOS mobile wallet for iPhone and Apple Watch?
64	Is your mobile credential approved by Google and working in the Google Pay wallet?
65	How many clients have successfully deployed an Apple- or Google- approved mobile credential that's native to the Apple and Google Wallet?
66	How many clients have you signed up to use mobile credentials that are currently in production?
67	When did your first mobile credential client go live?
68	Is mobile credential supported on vending readers?
69	Can the mobile credential solution support a mixed environment security environment that includes multiple lock providers?
70	Is the mobile credential solution vendor agnostic and not tied to a specific manufacturer?
71	Describe the user experience onboarding with the mobile credential system and its user features.
72	Provide a high-level plan for implementing your card system at Appalachian with a migration and implementation timeline.
73	Describe the project implementation team including roles and typical amounts of experience.
74	Describe the ability to support and integrate with the card applications listed in 5.1.1.A.
75	Describe technical support services for your system and how you ensure a timely response to customer requests. Please report your Service Level Agreements (SLAs) with your system and processes for software updates and bug fixes.
76	Do you support Government ID, license, or supporting documents upload for verification purposes and/or provide any other capabilities for identity proofing?
77	Describe the requirements for integration with sources of data authority. Provide documentation on application programming interfaces (APIs) available in the product for inter-system integration purposes, including reporting.
78	How are new cardholders added to the system?
79	How can plan level detail by cardholder be viewed?
80	Can the proposed system assign and revoke cardholder privileges and suspend and reactivate the use of privileges?
81	Describe how to manage cardholder funds (i.e. deposits, transfers, withdrawals, etc.).
82	Can the proposed system facilitate fund disbursement and settlements to external vendors and allocations to internal departments?
83	How does the system allow for the use of previously captured and stored JPEG images with the ID Card Production System?
84	Can the proposed system provide personalization and encoding for cards at the time of production?
85	Describe the different card numbering formats and standards supported by the proposed system.
86	Does the proposed system allow the campus to produce custom card designs and logic based on cardholder type?
87	Is the database for the card production system ODBC compliant?
88	The proposed system must include an import/export utility. Describe the system tools provided?

89	Describe the printer options available to the campus for card production. Do you offer a native embedded NFC encoder for inline encoding?
90	Describe the camera options that integrate with the card production software and/or proposed card printer.
91	Is it possible to utilize/integrate our currently issued cards and data so re-carding does not have to take place immediately? We presently use Entrust DataCard Instant ID software.
92	After reviewing our inventory of card readers and controllers specified in Section 5.1.3, describe what readers and control equipment will need to be replaced or upgraded to move to the proposed system.
93	Does your company have visibility in the production and technology within the reader for the short- and long-term future?
94	Does your company partner with hardware vendors to re-sell PoS and/or access control hardware? If so, which manufacturers?
95	Does your company use custom firmware on third party hardware devices? If so, is it optional or required?
96	While a Security Management System (SMS) integrated with the card access is beyond the scope of this project, does your company provide, either as part of the product or via third-party integration, an inter-system workflow solution for integration between the card system and IP based camera systems. If so, do you have any specific examples of an integration with Milestone or Genetec?
97	While implementation of a menu management solution is beyond the scope of this proposal, does the system currently support interfaces to any menu management or food production systems? If yes, provide examples.
98	At Appalachian, all software, hardware and IT systems used for academic and research purposes, administrative and business purposes, and customer service must be Accessible and produce Accessible products or content, which includes compatibility with assistive technology. Describe your products accessible features and compatibility with assistive technology and include copies of your products Voluntary Product Accessibility Template (VPAT) if available.
99	What relational database management system (RDBMS) is supported?
100	Where is the RDBMS installed? On premise or cloud based?
101	If the RDBMS is installed on premise, is Oracle supported? Is Oracle RAC supported?
102	What level of access to the RDBMS will App State personnel have?
103	What is App State's responsibility with regard to administering the RDBMS?