

## **STATE OF NORTH CAROLINA**

**North Carolina A&T State University**

**Request for Proposal #: 59-P2383**

**Call Center Services**

**Date of Issue: April 3, 2024**

**Proposal Opening Date: April 24, 2024**

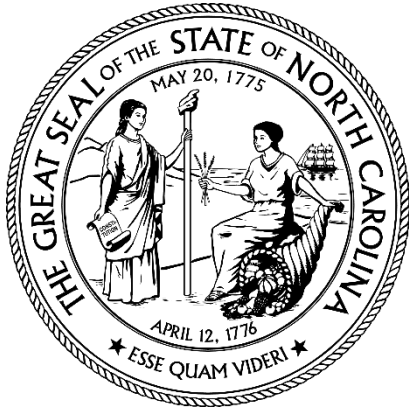
**At 3:00 p.m. ET**

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

**Martinique "Nikki" Williams**

**Director of Procurement Services**

**Email: [mcwilli2@ncat.edu](mailto:mcwilli2@ncat.edu)**



## STATE OF NORTH CAROLINA

### Request for Proposal #

**59-P2383**

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.**

\_\_\_\_\_  
Vendor Name

\_\_\_\_\_  
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>

<b>STATE OF NORTH CAROLINA</b> <b>North Carolina A&amp;T State University</b>	
Refer <u>ALL</u> Inquiries regarding this RFP to: <b>Martinique “Nikki” Williams</b> <b>mcwilli2@ncat.edu</b>	Request for Proposal #: 59-P2383 Proposals will be publicly opened: <b>Wednesday, April 24, 2024 at 3:00 p.m. ET</b> Commodity No. and Description: 80000000 / Management and Business Professionals and Administrative Services

**EXECUTION**

In compliance with this Request for Proposals (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),
- 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 contracts; 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 is not aware that any such gift has been offered, accepted, or promised by any employees of your 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 shall not 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:	

Proposal Number: 59-P2383

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

VENDOR'S AUTHORIZED SIGNATURE*:	DATE:	EMAIL:
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**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.

<p><b>FOR STATE USE ONLY:</b> Offer accepted and Contract awarded this _____, as indicated on</p> <p>The attached certification, by _____.</p> <p style="text-align: center;"><b>(Authorized Representative of Director of Procurement Services)</b></p>
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## 1.0 PURPOSE AND BACKGROUND

### 1.1 Purpose

North Carolina Agricultural and Technical State University (“University”) is seeking proposals from qualified firms for Call Center Services in accordance with the Scope of Work specified in this Request for Proposal (RFP). The University desires to partner with a company to provide in bound telephone, chat, text, outbound campaigns, and e-mail support services to handle calls for Student Support Services. Proposals should address these areas. While the above-named services are separate, functional areas within the university, require transparent Student Support Services call support for anyone requesting assistance. Services are required to support students, faculty and staff. The University is looking for a tiered business model that will include clear escalation policies, knowledge management, service level agreements, data analytics, metrics and extended hours of support. Service providers should expect specific services to be selected on an if needed, as needed basis; and volume of call support cannot be guaranteed.

For the purpose of this RFP, Student Support Services includes but is not limited to the following areas: Financial Aid Department, Treasurer Department (Accounts Receivable), Admissions Office, Registrar (Records) Office, and the Center for Academic Excellence – Advising Office. Because of the nature of financial aid processing, accounts receivable services and general student services, there is a large number of calls presented, handled and abandoned (Refer to Section 5: Scope of Work), and a significant overlap in questions handled by a call support center. (Refer to SAMPLE QUESTIONS). For purposes of this RFP, the Financial Aid, Student Services and Accounts Receivable Service functions are to be considered as one functional area for call support

### 1.2 Background

Longitudinal data indicates N.C. A&T peaks in phone volume are seasonal in nature. The largest spikes fall within four (4) specific periods:

- a) August and September – opening of the fall semester;
- b) October and/or November – spring semester registration
- c) January – opening of the spring semester
- d) April – priority registration for fall/end of the academic year

During the month of May 2023, Student Support Service Offices, received 29,188 phone calls. This call volume number does not include the IT Help Desk, the campus main number, offices located in Student Affairs (Housing) or Campus Enterprise (Bookstore). The student experience for both current and prospective students is adversely affected because the volume of calls received exceeds the current capacity.

Most of these departments have employees that are hired to complete daily operational tasks; not related to answering telephone inquiries. A snap shot below provides a summary of the phone calls from May 1 through May 31, 2023.

**Table 1: Summary of Phone Calls from May 1 through May 31, 2023**

Dept:	Calls Placed	Calls Answered	Calls Abandoned	% of Calls Handled
Registrar	7594	5454	2140	72%
Admissions	10133	6081	4052	60%
Treasurer	4026	2850	1176	71%
Financial Aid	7158	5468	1690	76%
CAE	277	155	122	56%

**University Impact**

On average 31% of the calls were abandoned in a one-month period, current students, prospective students, parents, and alumni within the 31%, did not receive the information they were seeking, had to spend more of their time to call back or write an email, and did not have a good “Aggie Experience”. If their concern was an unresolved problem, the inability to speak with someone exasperates the issue.

**Table 2: Call Volume by Student Support Area – November 19, 2023**

Application Name	Called Number	Calls Presented	Flow-In	Flow- Out	Calls Handled	Avg Calls Handled	Avg Speed Of Answer	Avg Talk Time	Avg Work Time	Calls Abandoned	Avg Calls Abandoned	Avg Abandoned Time
Admissions	3055180699	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Admissions	54932	65	0	5	65	100%	0:02:13	0:02:15	0:00:29	0	0%	0:00:00
Admissions	54140	20477	0	2355	8085	39%	0:02:37	0:02:17	0:00:26	12392	61%	0:02:36
Admissions	47595	26	0	2	26	100%	0:02:41	0:02:22	0:00:27	0	0%	0:00:00
Admissions	8602053354	1	0	0	1	100%	0:02:04	0:04:46	0:00:30	0	0%	0:00:00
Admissions	54931	279	0	14	278	100%	0:03:26	0:03:05	0:00:26	1	0%	0:00:32

Admissions	7043919631	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Admissions	47195	7	0	0	7	100%	0:09:03	0:02:23	0:00:46	0	0%	0:00:00
Admissions		1	1	0	0	0%	0:00:00	0:00:00	0:00:00	1	100%	0:06:53
Admissions	47946	105846	1	15966	53666	51%	0:02:27	0:02:19	0:00:26	52180	49%	0:02:28
Admissions	918647720453	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00

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Admissions	47721	2	0	0	2	100%	0:09:19	0:41:11	0:00:30	0	0%	0:00:00
Admissions	54933	4	0	0	4	100%	0:00:06	0:02:34	0:00:20	0	0%	0:00:00
Admissions	47973	84	0	0	84	100%	0:02:28	0:02:51	0:00:26	0	0%	0:00:00
Admissions	54053	1	0	0	1	100%	0:00:08	0:00:01	0:00:30	0	0%	0:00:00
Admissions	919122246000	1	0	0	1	100%	0:00:03	0:03:14	0:00:30	0	0%	0:00:00
Admissions	7043719772	1	0	0	1	100%	0:00:02	0:01:45	0:00:30	0	0%	0:00:00
CAE	54932	1	0	1	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
CAE	47855	2708	0	667	1632	60%	0:00:25	0:04:48	0:01:22	1076	40%	0:01:02
CAE	54068	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
CAE	47595	2	0	0	2	100%	0:00:17	0:05:23	0:01:08	0	0%	0:00:00
Financial Aid	54933	8	0	0	8	100%	0:05:27	0:06:33	0:00:07	0	0%	0:00:00
Financial Aid	52849	41395	0	0	11748	28%	0:07:34	0:05:05	0:00:25	29647	72%	0:05:15
Financial Aid	54109	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Financial Aid	9108539518	1	0	0	1	100%	0:00:08	0:08:23	0:00:30	0	0%	0:00:00
Financial Aid	47195	2	0	0	2	100%	0:10:48	0:02:41	0:00:15	0	0%	0:00:00
Financial Aid	47721	40	0	0	40	100%	0:02:36	0:07:11	0:00:26	0	0%	0:00:00
Financial Aid	12593	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00

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Financial Aid	54015	13	0	0	2	15%	0:00:08	0:04:45	0:00:30	11	85%	0:00:08
Financial Aid	9105847164	1	0	0	1	100%	0:00:03	0:02:27	0:00:30	0	0%	0:00:00
Financial Aid	912402537805	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Financial Aid	47500	17	0	0	0	0%	0:00:00	0:00:00	0:00:00	17	100%	0:00:00
Financial Aid	8602053354	1	0	0	1	100%	0:04:26	0:00:44	0:00:30	0	0%	0:00:00
Financial Aid	3369297675	1	0	0	1	100%	0:00:01	0:02:30	0:00:30	0	0%	0:00:00
Financial Aid	914109215613	1	0	0	1	100%	0:00:05	0:07:00	0:00:30	0	0%	0:00:00
Financial Aid	3173459355	1	0	0	1	100%	0:00:03	0:02:59	0:00:30	0	0%	0:00:00
Financial Aid	54931	7610	6722	0	4449	58%	0:03:01	0:04:31	0:00:26	3161	42%	0:03:48
Financial Aid	4439831580	1	0	0	1	100%	0:00:11	0:03:54	0:00:30	0	0%	0:00:00
Financial Aid	913362548447	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Financial Aid	913365496609	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Financial Aid	47595	3	0	0	3	100%	0:00:03	0:08:00	0:00:30	0	0%	0:00:00
Financial Aid	54932	5	0	0	5	100%	0:02:05	0:04:09	0:00:30	0	0%	0:00:00
Financial Aid	47973	33804	48	0	24001	71%	0:02:44	0:04:35	0:00:27	9803	29%	0:03:04
Financial Aid	912029149476	1	0	0	1	100%	0:22:28	0:00:58	0:00:13	0	0%	0:00:00
Financial Aid	913474662861	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00



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Financial Aid	918034793963	1	0	0	1	100%	0:00:06	0:00:03	0:00:30	0	0%	0:00:00
Financial Aid	47946	26	0	0	26	100%	0:00:52	0:05:15	0:00:28	0	0%	0:00:00
Financial Aid	8048730716	1	0	0	1	100%	0:00:02	0:02:18	0:00:30	0	0%	0:00:00
Financial Aid	53818	5	0	0	5	100%	0:00:01	0:08:57	0:00:30	0	0%	0:00:00
Financial Aid	54060	1	0	0	1	100%	0:01:21	0:01:02	0:00:30	0	0%	0:00:00
Financial Aid	54070	1	0	0	1	100%	0:00:10	0:17:45	0:00:08	0	0%	0:00:00
Registrar	9193955985	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Registrar	912024871365	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Registrar	913362107724	1	0	0	1	100%	0:00:20	0:01:27	0:00:30	0	0%	0:00:00
Registrar	912816247967	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Registrar	47973	47	0	1	47	100%	0:01:19	0:03:37	0:00:23	0	0%	0:00:00
Registrar	917575817304	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Registrar	54071	2	0	0	2	100%	0:00:03	0:00:45	0:00:30	0	0%	0:00:00
Registrar	913477570669	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Registrar	4144297392	1	0	0	1	100%	0:00:02	0:01:46	0:00:21	0	0%	0:00:00
Registrar	53818	2	0	0	2	100%	0:01:08	0:05:28	0:00:17	0	0%	0:00:0
Registrar	47195	5	0	0	5	100%	0:03:24	0:04:47	0:00:48	0	0%	0:00:00

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Registrar	913363825769	1	0	0	1	100%	0:00:12	0:01:58	0:00:18	0	0%	0:00:00
Registrar	54932	7736	7100	298	4209	54%	0:01:00	0:02:34	0:00:23	3527	46%	0:01:12
Registrar	52850	28250	0	1153	17876	63%	0:01:03	38:35:32	0:00:22	10374	37%	0:01:18
Registrar	54931	97	0	2	97	100%	0:01:17	0:03:18	0:00:24	0	0%	0:00:00
Registrar	47721	8	0	0	8	100%	0:03:18	0:03:37	0:00:25	0	0%	0:00:00
Registrar	54070	1	0	0	1	100%	0:01:27	0:01:17	0:00:30	0	0%	0:00:00
Registrar	47595	33232	74	313	23958	72%	0:01:08	0:03:03	0:00:24	9274	28%	0:01:16
Registrar	913366018103	1	0	0	1	100%	0:04:12	0:03:00	0:00:30	0	0%	0:00:00
Registrar	54447	1	0	0	1	100%	0:00:07	0:01:48	0:00:30	0	0%	0:00:00
Registrar	54933	3	0	0	3	100%	0:01:32	0:03:07	0:00:15	0	0%	0:00:00
Registrar	47946	45	0	0	45	100%	0:00:43	0:03:58	0:00:24	0	0%	0:00:00
Registrar	917577767355	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Registrar	913366921237	1	0	0	1	100%	0:01:54	0:01:09	0:00:04	0	0%	0:00:00
Registrar	5166684532	1	0	0	1	100%	0:00:02	0:09:09	0:00:30	0	0%	0:00:00
Treasurer	54931	84	0	0	84	100%	0:01:26	0:03:03	0:00:26	0	0%	0:00:00
Treasurer	4048619361	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Treasurer	47595	12	0	0	12	100%	0:00:16	0:02:20	0:00:26	0	0%	0:00:00

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Treasurer	47973	149	0	0	148	99%	0:00:48	0:02:50	0:00:25	1	1%	0:00:06
Treasurer	54933	1576	1546	0	966	61%	0:01:12	0:02:26	0:00:11	610	39%	0:01:46
Treasurer	9514903428	1	0	0	1	100%	0:00:16	0:15:05	0:00:30	0	0%	0:00:00
Treasurer	4438032310	1	0	0	1	100%	0:00:12	0:06:37	0:00:17	0	0%	0:00:00
Treasurer	9102864859	1	0	0	1	100%	0:00:00	0:00:00	0:00:00	0	0%	0:00:00
Treasurer	919803180387	1	0	0	1	100%	0:00:10	0:01:21	0:00:30	0	0%	0:00:00
Treasurer	915713347462	1	0	0	1	100%	0:00:41	0:01:04	0:00:30	0	0%	0:00:00
Treasurer	47721	30555	19	0	18992	62%	0:01:31	0:02:43	0:00:24	11563	38%	0:01:37
Treasurer	54932	8	0	0	8	100%	0:01:13	0:03:09	0:00:21	0	0%	0:00:00
Treasurer	912488423898	1	0	0	1	100%	0:02:26	0:03:59	0:00:30	0	0%	0:00:00
Treasurer	47946	11	0	0	11	100%	0:01:56	0:05:04	0:00:18	0	0%	0:00:00
		314299	15511	20777	170661	54%				143638	46%	

The intent of this solicitation is to award an University Contract.

### 1.1 CONTRACT TERM

The Contract shall have an initial term of three (3) years, beginning on the date of final Contract execution (the “Effective Date”). The Vendor shall begin work under the Contract within sixty (60) business days of the Effective Date.

At the end of the Contract’s initial term, the University shall have the option, in its sole discretion, to renew the Contract on the same terms and conditions for up to three (3) additional one-year terms. The University 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 University reserves the right to extend the Contract after the last active term.

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

## 2.0 GENERAL INFORMATION

### 2.1 REQUEST FOR PROPOSAL DOCUMENT

This 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 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 are also 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 of this RFP, those must be submitted as questions in accordance with the instructions in the PROPOSAL QUESTIONS Section. If the University determines that any changes will be made because of the questions asked, then such decisions will be communicated in the form of an RFP addendum. The University 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 University rejects and will not be required to evaluate or consider any additional or modified terms and conditions submitted with Vendor’s proposal or otherwise. 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 University 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.**

### 2.3 RFP SCHEDULE

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

Event	Responsibility	Date and Time
Issue RFP	University	Wednesday, April 3, 2024
Hold Pre-Proposal Meeting/Site Visit	University	N/A
Submit Written Questions	Vendor	Friday, April 12, 2024 at 3:00 p.m. ET
Provide Response to Questions	University	Wednesday, April 17, 2024 by 5:00 p.m. ET
Submit Proposals	Vendor	Wednesday, April 24, 2024 at 3:00 p.m. ET

*Oral Presentations	Vendor	TBD
Response Evaluation Complete	University	Friday, May 17, 2024
Contract Award	University	June 1, 2024

Note 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. If presentations are requested, vendors will be notified via email with an invitation to attend a presentation. Therefore, all proposals should be complete and reflect the most favorable terms available from the

**2.4 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 emailed to [mcwilli2@ncat.edu](mailto:mcwilli2@ncat.edu) by the date and time specified above. **Vendors should enter “RFP #59-P2383: Questions” as the subject for the email.** Question submittals should include a reference to the applicable RFP section and be submitted in the format shown below:

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

Questions received prior to the submission deadline date, the University’s response, and any additional terms deemed necessary by the University will be posted in the form of an addendum to *the 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 University 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 the RFP and an addendum to this RFP.

**2.5 PROPOSAL SUBMITTAL**

**All proposal responses shall be submitted electronically via the electronic Vendor Portal Bonfire.**

**BONFIRE INSTRUCTIONS**

**IMPORTANT NOTE: It is the responsibility of the Vendor to have the signed quote physically in Bonfire by the specified time and date of opening. This is an absolute requirement. Bonfire will not allow the response to be submitted after the specified date and time.**

**All proposal responses shall be submitted electronically at Bonfire using the link below. WE WILL NOT ACCEPT PAPER RESPONSES.**

<https://ncat.bonfirehub.com/portal/?tab=openOpportunities>

- For Technical Information Contact: Bonfire Support by 1-800-354-8010 Ext. 2 Support by phone and email is available Monday – Friday from 8:00 AM – 8:00 PM ET.
- 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 proposing on this RFP periodically check the State’s eVP website for any Addenda that may be posted regarding this solicitation.

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 to this RFP periodically check the State's eVP website for any Addenda that may be issued prior to the bid opening date. All Vendors shall be deemed to have read and understood all information in this RFP and all Addenda thereto.

## 2.6 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 University rejecting Vendor's proposal, in the University'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 proposer 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 all **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 – responses to areas that require vendor input.**
- 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 version of ATTACHMENT H: COMPANY EXPERIENCE
- l) Completed version of ATTACHMENT I: STAFFING AND TRAINING
- m) Completed version of ATTACHMENT J: SERVICE
- n) Completed version of ATTACHMENT K: METRICS AND REPORTS
- o) Completed version of ATTACHMENT L: QUALITY ASSURANCE
- p) Completed version of ATTACHMENT M: TECHNOLOGY
- q) Completed version of ATTACHMENT N: PROJECT PLAN AND IMPLEMENTATION
- r) Complete the questions in Bonfire related to CONFLICT OF INTEREST.
- s) Completed and signed version of CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS and OMB STANDARD FORM LLL

## 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 University 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 University'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, the University 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 University to do so.

The University 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.

Proposals will be evaluated based on the requirements set forth in the RFP. Responsive proposals shall be reviewed and evaluated by representatives of various areas of the University. Each committee member will individually review and evaluate the information provided in a bidder's response, and based on the criteria below, may award up to the maximum available points for each category.

#### **The University 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 University 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 University 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 University.

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.**

Upon completion of the evaluation process, the University will make award(s) based on the evaluation and post the award(s) to the University’s eVP website under the RFP number for this solicitation. Award of a Contract to one Vendor does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was deemed most advantageous and represented the best value to the University.

**The University 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 University.**

**3.4 EVALUATION CRITERIA**

In addition to the general criteria in G.S. 143-52 which may or may not be relevant to this RFP, all qualified proposals will be evaluated, and award made based on considering the following criteria, to result in an award most advantageous to the University:

**Technical Category**

Criteria	Maximum Points Available
Company: Background and Experience	20
Methodology in providing service, including the ability to meet minimum service level standards as described in the RFP.	40
Metrics and Report	40
Quality Assurance	20
Technical Capabilities	20
Implementation plan and timeframes	30
Staffing	20
Contract Management	20
References	5
<b>Technical Category Maximum Available Points</b>	<b>215</b>

**Price Category**

Criteria	Maximum Available Points
The University will determine low cost by normalizing the scores as follows: The proposal with the lowest cost will receive a score of XX. All other competing proposals will be assigned a portion of the maximum score using the formula:  $35 \text{ points} \times \frac{\text{the cost of the lowest cost proposal}}{\text{the cost of the cost proposal being evaluated}}$	35
<b>Price Category Maximum Available Points</b>	<b>35</b>



Category	Maximum Available Points
Technical	215
Price	35
<b>Total Maximum Available Points</b>	<b>250</b>

**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 University 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 University:

- a) Total cost to the University
- b) Level of quality provided by the Vendor
- c) Process and performance capability across multiple jurisdictions
- d) Protection of the University’s information and intellectual property
- e) Availability of pertinent skills
- f) Ability to understand the University’s business requirements and internal operational culture
- g) Particular risk factors such as the security of the University’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 University; 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 University will take into consideration the degree to which Vendors have proposed or failed to propose solutions that will satisfy the University’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 University 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 to a requirement would allow for the University to receive a better proposal, the Vendor is urged 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 University for complete performance in accordance with the requirements and specifications herein, including implementation (planning, service design, training, etc.), ongoing Tier 1 call center support (per call, per minute, and all other costs such as software licensing, ADA/foreign language speaking services, transportation, handling administrative and other similar fees, etc.) Unless requested by the evaluation committee, any costs and expenses not clearly identified as part of the proposal may not be considered at a later date. Bidders should provide complete costing for individual Student Support Services. Optional costs should be clearly identified as such separately. Complete the **PRICING Table in Bonfire**..

The pricing submitted in Bonfire, or resulting from any negotiations, is incorporated herein and shall become part of any resulting Contract.

#### 4.2 INVOICES

Vendor shall invoice the University. The standard format for invoicing shall be single invoices (e.g., monthly quarterly or annually) for call cost. If there are additional costs, depending on an agreement of such, the University shall agree on the frequency of the invoice. Invoices shall include detailed information to allow the University to verify pricing that matches the correct price from a contract. The following fields shall be included on all invoices, as relevant:

Vendor’s Billing Address, University Customer Account Number, Invoicing Period, University Purchase Order Number, Service/Product Descriptions, Price, Quantity, and Unit of Measure.

Vendor shall submit all invoices in accordance to the Bill To information on the purchase order:

**By Email: NCAT.Invoices@trustflows.com (invoice must be attached to the email)**

**Or**

**By Mail: Accounts Payable  
North Carolina A&T State University  
PO Box 3986  
Scranton, PA 18505**

#### 4.3 PURCHASE ORDERS

The University shall issue a purchase order(s) for the services rendered. The Vendor shall be responsible for ensuring the appropriate purchase order number is on each invoice submitted to the University for payment processing.

#### 4.4 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 a 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 **ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION**. The University is requiring this certification to minimize potential issues from contracting with a Vendor that is financially unstable. From the date of the Certification to the expiration of the Contract, the Vendor shall notify the University within thirty (30) days of any occurrence or condition that materially alters the truth of any statement made in this Certification. The Contract Manager may require annual recertification of the Vendor’s financial stability.

#### 4.5 HUB PARTICIPATION

Pursuant to North Carolina General Statute G.S. 143-48, it is University 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 University’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**.

#### 4.6 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 University. 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.

#### 4.7 REFERENCES

Vendor shall provide at least three (3) current references and three (3) former references, using **ATTACHMENT E: CUSTOMER REFERENCE FORM**, for which it has provided Services of similar size and scope to those proposed herein. The University contact these users to determine whether the Services provided are substantially similar in scope to those proposed herein and whether Vendor’s performance has been satisfactory. The information obtained *shall* be considered in the evaluation of the Proposal.

#### 4.8 BACKGROUND CHECKS

Vendor and its personnel are required to provide or undergo background checks at Vendor’s expense prior to beginning work with the University. As part of Vendor background, the following details must be provided to the University within twenty-four hours (24) if requested:

- a) Any **criminal felony conviction**, or conviction of any crime involving moral turpitude, including, but not limited to fraud, misappropriation or deception, by Vendor, its officers or directors, or any of its employees or other personnel to provide Services on this project, of which Vendor has knowledge, or provide a statement that Vendor is aware of none;
- b) Any **criminal investigation** for any offense involving moral turpitude, including, but not limited to fraud, misappropriation, falsification or deception pending against Vendor of which it has knowledge, or provide a statement Vendor is aware of none;
- c) Any **regulatory sanctions** levied against Vendor or any of its officers, directors or its professional employees expected to provide Services on this project by any University or federal regulatory agencies within the past three years or a statement that there are none. As used herein, the term “regulatory sanctions” includes the revocation or suspension of any license or certification, the levying of any monetary penalties or fines, and the issuance of any written warnings;
- d) Any **regulatory investigations** pending against Vendor or any of its officers, directors or its professional employees expected to provide Services on this project by any University or federal regulatory agencies of which Vendor has knowledge or a statement that there are none.
- e) Any **civil litigation**, arbitration, proceeding, or judgments pending against Vendor during the three (3) years preceding submission of its proposal herein or a statement that there are none.

Vendor’s response to these requests shall be considered a continuing representation, and Vendor’s failure to notify the University within thirty (30) days of any criminal litigation, investigation or proceeding involving Vendor or its then current officers, directors or persons providing Services under this Contract during its term shall constitute a material breach of contract. The provisions of this paragraph shall also apply to any subcontractor utilized by Vendor to perform Services under this Contract.

##### 4.8.1 BACKGROUND CHECK LIMITATIONS

Any individual representing the Vendor, who:

- a) In his/her lifetime, has been adjudicated as a habitual felon as defined by GS 14-7.1 or a violent habitual felon as defined by GS 14-7.7, shall not be allowed to work in buildings occupied by University Government employees.
- b) During the last seven (7) years has been convicted of any criminal felony or misdemeanor sexual offense or a crime of violence shall not be allowed to work in buildings occupied by University Government employees.
- c) At any time has an outstanding warrant or a criminal charge for a crime described in (b) above shall not be allowed to work on University property.
- d) The Vendor must ensure that all employees have a responsibility to self-report to the Vendor within twenty-four (24) hours any arrest for any disqualifying offense. The Vendor must notify the Contract Administrator within twenty-four (24) hours of all details concerning any reported arrest.

- e) Upon the request of the Contract Administrator, the Vendor will re-screen any of its employees, agents, representatives, and subcontractors during the term of the Contract.
- f) Vendor’s responses to these background check requests shall be considered a continuing representation, and Vendor’s failure to notify the University within thirty (30) days of any criminal charge, investigation, or proceeding involving Vendor or its then-current officers, directors or persons providing Services under this Contract during its term shall constitute a material breach of contract. The provisions of this paragraph shall also apply to any subcontractor utilized by Vendor to perform Services under this Contract.
- g) If there are problems or delays with performance associated with the completion and compliance with this background check requirements, any Vendor’s performance bond could be used to complete these Services.

**4.8.2 DOCUMENT REQUIREMENTS**

Required documentation to be submitted to the University (if requested) for Services shall include:

- a) A cover letter by the Vendor on company letterhead with a list of the full names matching a required government issued photo ID, addresses, and birth dates of each person representing the contracting company.
- b) Vendor shall also provide a photocopy of the required State or Federal government issued picture ID or Driver License.
- c) A letter on company letterhead is not acceptable proof, but can be used to further clarify information on the criminal background check submitted. All documentation shall be submitted at the same time. Submit documents which are clear and legible.
- d) Background checks consisting of:
  1. Original unaltered criminal background check from the organization providing the background check.
  2. The background check provider’s company name, company mailing address, and contact phone numbers.
  3. The full name of the individual, which matches the government issued photo ID.
  4. The current address of individual being checked.
  5. The date the criminal background check search was conducted.

**4.8.3 VENDOR BACKGROUND CHECK AGREEMENT**

Vendor agrees to conduct a criminal background check per the specifications above in this section on all employees proposed to work under this Contract, at its expense, and provide the required documentation to the University in order to perform Services under this Contract:  YES  NO

**4.9 PERSONNEL/ STAFFING**

Vendor warrants that qualified personnel shall provide Services under this Contract in a professional manner. “Professional manner” means that the personnel performing the Services will possess the skill and competence consistent with the prevailing business standards in the industry. Vendor will serve as the prime contractor under this Contract and shall be responsible for the performance and payment of all subcontractor(s) that may be approved by the University. Names of any third-party Vendors or subcontractors of Vendor may appear for purposes of convenience in Contract documents; and shall not limit Vendor’s obligations hereunder. Vendor will retain executive representation for functional and technical expertise as needed in order to incorporate any work by third party subcontractor(s).

Should the Vendor’s proposal result in an award, the Vendor shall be required to agree that it will not substitute key personnel assigned to the performance of the Contract without prior written approval by the Contract Lead. Vendor shall further agree that it will notify the Contract Lead of any desired substitution, including the name(s) and references of Vendor’s recommended substitute personnel. The University will approve or disapprove the requested substitution in a timely manner. The University may,

in its sole discretion, terminate the Services of any person providing Services under this Contract. Upon such termination, the University may request acceptable substitute personnel or terminate the contract Services provided by such personnel.

**4.10 VENDOR’S REPRESENTATIONS**

If Vendor’s 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 University 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 AGENCY INSURANCE REQUIREMENTS MODIFICATION**

A. Default Insurance Coverage from the General Terms and Conditions applicable to this Solicitation:

- Small Purchases
- Contract value in excess of the Small Purchase threshold, but up to \$1,000,000.00
- Contract value in excess of \$1,000,000.00

**4.12 LOBBYING ACTIVITY CERTIFICATION FOR FEDERAL GRANTS**

Federal law prohibits recipients of federal funds, whether through grants, contracts, or cooperative agreements, from using those funds to influence or attempt to influence (lobby) a federal official in connection with obtaining, extending, or modifying any federal contract, grant, loan, or cooperative agreement. Further, federal law requires that applicants for federal funds certify:

- that they abide by the above restriction;
- that they disclose any permissible (non-federal) paid lobbying on the Federal Awards being applied for; and
- that such certification requirements will also be included in any subawards meeting the applicable thresholds.

Vendors must complete and submit the CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS and the OMB STANDARD FORM LLL when responding to this solicitation.

**5.0 SPECIFICATIONS AND SCOPE OF WORK**

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**5.1 GENERAL**

University operations require a high level of customer service support in Student Support Services functions. The types of call center support services required of the successful offering firm include a minimum of telephone, email, and chat coverage. Student Support Services support the academic, social, and financial transactions for all students from initial application through goal completion, and beyond. There is no guarantee as to the amount of work that may be performed under any resulting contract.

**5.1.1 Objective:**

The aim of the University Call/Contact Center is to enhance student, parent, and guardian satisfaction by offering information, assistance, and guidance to address various queries and requests. Providing this level of support is critical during peak times as it can impact enrollment and reputation. While most inquiries are expected to come via phone calls, we are looking for a vendor who can provide text/chat support, and any other modes of communication offered by the vendor are welcome.

**5.1.2 Scope:**

Proposal Number: 59-P2383

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

The Call/Contact Center's scope is to handle inbound inquiries for the following administrative areas: Admissions, Financial Aid, Academic Advising (known as Center for Academic Excellence), Registrar, and Treasurer regarding new and current students. The vendor must provide customer service agents to serve our customers. Additionally, the vendor must work with the University to develop workflow plans, operational guidelines, reports, and training manuals per administrative area.

**5.1.3 Staffing:**

The vendor must provide customer service agents who are well-equipped to handle inquiries effectively. The staff should be trained on the University's policies and procedures and embody NCAT's culture of excellence. Call center agents should possess excellent communication skills, knowledge of university culture and procedures, and the ability to handle inquiries effectively.

#### 5.1.4 Technology:

We prefer that the vendor use our current phone system for call routing (Cisco Contact Center Express, UCCX). The vendor will document, track, and retain customer resolution data. This data is required to provide the University reports to measure the center's success and efficacy. If a vendor utilizes CRM software to manage customer relation data, NCAT prefers the CRM to be easily integrated with UCCX. Providing evidence of this integration from prior experience is welcomed. The more accessible or less complicated technology installation or integration is accepted. If necessary, NCAT will assist the vendor with access and integration with our systems.

#### 5.1.5 Performance:

The vendor shall monitor and analyze the call center's performance to ensure it meets its objectives. This includes tracking call volume, wait times, call resolution rates, and customer satisfaction. You should also gather feedback from students and staff to identify areas for improvement and make adjustments as needed. The University Call/Contact Center aims to enhance student, parent, and guardian satisfaction by offering information, assistance, and guidance to address various queries and requests. Providing this level of support is critical during peak times as it can impact enrollment and reputation. While most inquiries are expected to come via phone calls, we are looking for a vendor who can provide text/chat support, and any other modes of communication the vendor offers are welcome.

#### 5.1.6 APPROACH

Implementing a call center at a university requires careful planning and coordination to ensure its effectiveness in handling various inquiries and providing excellent service to students, faculty, staff, and other stakeholders. Here's a suggested hybrid methodology phased-approach to implementing a call center at NCAT.

##### a) Phase 1: Needs Assessment

- Identify the current communication challenges faced by the university community.
- Analyze existing communication channels (e.g., email, in-person inquiries, online forms) to understand their limitations.
- Define Objectives and Scope

##### b) Phase 2: Clearly outline the goals and objectives of the call center.

- Develop the scope of services the call center will provide given the information provided in this document and meetings with the project team.
- Establish key performance indicators (KPIs) to measure the success and efficiency of the call center, such as response time, call resolution rate, and customer satisfaction scores.

##### c) Phase 3: Infrastructure and Technology

- Assess the technology requirements for setting up the call center, including hardware, software, and telephony systems.
- Choose a suitable call center software solution that aligns with the university's needs and budget.
- Ensure integration with existing university systems such as student information systems, CRM systems, and knowledge bases.
- Set up a robust network infrastructure to support the call center operations, including high-speed internet connectivity and backup systems.

##### d) Phase 4: Staffing and Training

- Determine the staffing requirements based on expected call volume and service hours.
- Recruit and train call center agents with excellent communication skills, product knowledge, and customer service expertise.
- Develop comprehensive training programs covering call handling procedures, university policies, and relevant technology tools.
- Provide ongoing training and professional development opportunities to enhance agent performance and satisfaction.

##### e) Phase 5: Process Design and Documentation

- Design call flow processes to ensure efficient handling of inquiries and escalations.
- Develop standard operating procedures (SOPs) for common scenarios and frequently asked questions.
- Document troubleshooting steps and resolution protocols for technical support queries.
- Establish escalation pathways for complex issues that cannot be resolved at the first level of support.

##### f) Phase 6: Quality Assurance and Monitoring:

- Implement quality assurance processes to monitor call center performance and adherence to standards.

- Conduct regular call monitoring and evaluations to assess agent performance and identify areas for improvement.
- Solicit feedback from callers through post-call surveys or feedback forms to measure customer satisfaction and identify areas for service enhancement.

**g) Phase 7: Launch and Rollout**

- Pilot the call center operations with a small team to test systems, processes, and technology.
- Iterate and make necessary adjustments based on pilot results and feedback.
- Communicate the launch of the call center to the university community through various channels (e.g., email announcements, website updates, social media).
- Provide training and support to university staff and stakeholders on how to interact with the call center effectively.

**h) Phase 8: Continuous Improvement**

- Establish a culture of continuous improvement by regularly reviewing call center performance metrics and identifying opportunities for optimization.
- Solicit feedback from callers and agents to identify pain points and areas for service enhancement.
- Stay abreast of emerging technologies and best practices in call center management to drive innovation and efficiency.
- Engage in benchmarking activities to compare the university's call center performance with industry standards and peer institutions, identifying areas for improvement.
- By following this planned approach, the university can successfully implement a call center that improves communication, enhances customer service, and supports the needs of its diverse stakeholders.

**5.1.7 KEY DELIVERABLES**

Key project deliverables for the implementation and operation of an effective call center to support the functional areas identified in this Request for Proposal are those identified in this RFP.

The successful bidder will be the one that most ably demonstrates the ability to (a) meet all due dates and comply with the terms and conditions of this RFP, (b) handle the indicated rollover call volumes (peak and off-season) and emails while meeting/exceeding the minimum service standards, (c) handle outgoing call and email campaigns, (d) effectively interface with all necessary Institution technology platforms, and (e) appropriately address the topics, issues and concerns expressed

**5.1.8 MINIMUM SERVICE STANDARDS REQUIREMENTS**

Below are the minimum acceptable standards of service requirements:

- Sunday through Saturday, 7:00 a.m. to midnight (eastern time) coverage required. No services are required on Thanksgiving Day, Christmas Eve and Christmas Day, New Year's Day, Martin Luther King, Jr. Day, Good Friday, Memorial Day, Juneteenth Day, Independence Day, Labor Day. Reduced hours for the day before and after Thanksgiving, New Year's Eve Day will be considered on a per year basis;
- Customer satisfaction will be consistently in top quartile;
- Abandonment rate will not exceed 15%. i.e., 85% of all incoming answered;
- Response time for phone/chat to be less than 120 second peak, 60 second non-peak;
- Response time for email to be less than 5 minutes; and
- 95% resolution rate for first point of contact. Transferring a call to a higher tier at the University, or transferring a call to a higher tier internally, will not be considered a resolution.

**5.1.9 Technical**

The University uses the following systems to support Student Support Services:

- Unified Communications Cisco Unified Contact Center Express (UCCX)
- Ellucian Banner ERP;
- Slate
- NEST
- Zoom



- f) Microsoft Office Suites
- g) Federal websites required by the U.S. Department of Education and Veteran’s Administration;

**5.1.10 CALL /CENTER SUPPORT TIERS**

**a) Tier 1 Support Consists of the following:**

- Inbound calls or contact, support requests defined as “How To” /”Frequently Asked Questions” and can usually be found on the university’s website or through knowledge of institutional processes.
- Outbound calls designed to prompt a specific action or gather specific data from the target group.

**b) Tier 2 Support also includes:**

- Providing account status information for inbound calls. This type of support would require read only access to Banner forms and other related systems (e.g., Slate, NEST, etc.) so bidder’s staff can inform students of their current status and provide assistance with appropriate next steps.
- Out bound calls designed to prompt a specific action and move students’ past retention roadblocks.

**c) Tier 3 Support also includes:**

- Customer queries that require escalation to university staff and/or faculty with a level of expertise for assistance.

The company will serve as Tier 1 and Tier 2 as defined above for the rollover inbound support requests, emails and outbound campaigns. If a call or email evolves into a support or advising request that cannot be resolved by Tier 1 or Tier 2, the service ticket will be escalated as Tier 3 to a university staff or faculty employee. The company will act as liaison between the customer and the university (Tier 3) in the event a request requires escalation.

The company will follow up with the university daily of/when they receive inbound calls or emails related to a prior Tier 3 escalation that remains unresolved.

Students will be authenticated prior to the conversation being completed, to comply with FERPA regulations.

FERPA Proxy Access will be authenticated prior to the conversation being completed with anyone calling seeking account specific details, to comply with FERPA regulations. If FERPA Proxy Access is not in place, conversation will adhere to basic, directory information only.

The university will provide single sign-on, read-only access to the required forms in the Banner student information system as well as access to all pertinent databases and websites used by the university Tier 2.

The awarded bidder will work with university subject area experts to develop a user manual including a workflow process upon signing of a contract.

**5.2 PROPOSAL RESPONSES TO THE SCOPE OF WORK AND REQUIREMENTS**

Responses shall be in narrative form, must be clear and thorough, but concise, and written in plain, easy to understand language. Responses must be presented under the Attachments as requested.

**5.2.1 ATTACHMENT: H: COMPANY EXPERIENCE/BACKGROUND AND QUALIFICATIONS.** The vendor shall discuss in detail the company’s background and experience by addressing at a minimum the following:

- a) Discuss the company’s understanding of the call center industry, student support administration and the importance of the center to university stakeholders.
- b) Discuss in detail the company’s experience in servicing higher education students, faculty, and staff or other public sector clients;
- c) Discuss the company’s experience in providing call center services specifically to each of the Student Support Services requested:
  - i. Registrar Office
  - ii. Admissions
  - iii. Treasurer

- iv. Financial Aid
- v. Center for Academic Excellence – (CAE – Advising)

**5.2.2 ATTACHMENT: I: STAFFING and TRAINING** .The vendor shall discuss in detail the company’s staffing capabilities and capacity to provide the services requested in the RFP.

- a) Provide proposed staffing to meet the minimum standards and n
- b) What are the key qualifications of the call center staff to provide support responsibilities for:
  - i. Experience with system integrations
  - ii. Security and training measures to properly handle confidential student information;
  - iii. Support for ADA compliance, including limitations
- c) Is staff in one location, multiple, international, home-based, etc.;
- d) Provide a profile of what minimum skills and experience employees have whole providing service to your clients;
- e) Outline the organizational criteria to assess staff’s knowledge and ability to perform;
- f) What assessment tolls are used to determine staff’s knowledge, as well as steps taken if knowledge is deficient;
- g) Provide links to any demonstrations of your service.
- h) How will staff be trained to meet and maintain the minimum service standards;
- i) Discuss how staff handle calls that include multiple student service and/or support issues;
- j) How a “knowledge base: will be maintained to ensure relevance and how utilization of knowledge base articles will be tracked; how the company will maintain/update knowledge base; details regarding university access to the knowledge base and/or written procedures.
  - i. Ability for university personnel to update the knowledge base and have changes take effect in real time and send update notifications to call center staff.
  - ii. Ability to directly or assist in coaching/training staff on new knowledge base articles/processes.
- k) Discuss how staffing will be managed during call volume peaks;
- l) Discuss how callbacks will be handled and resolution tracked;
- m) Do you normally hire client’s students and if so, what is the existing or proposed conflict of interest methodology for employees who may be or may become university students or are family members of students.
- n) What is the training approach for regulatory compliance and updates to Title IV regulatory issues?
- o) Discuss experience with non-English speaking customers and proposed resolution processes;
- p) Will calibration calls be part of the proposed services, and if yes, what is the proposed schedule?

**5.2.3 ATTACHMENT: J: SERVICE.** The vendor shall discuss in detail the service elements of how the company will provide call center services as requested herein.

- a) Discuss in detail how the company will operate a centralized call center to support anticipated call volume;
- b) Ability to provide for chat bot, text messaging and Rapid Response outbound campaigns and/or robo calls.
- c) Will the university be required to purchase any software/hard or licensing for the company to provide this service? If so, discuss what and the use.
- d) Discuss the ticketing system used by the firm, and whether the company has integrated it with ellucian Banner or other university software.
- e) What measures does the firm take to ensure confidentiality and security in dealing with personal data in relation to FERPA, to meet federal financial and compliance regulations and ADA considerations;
- f) Discuss how callbacks will be handled and resolution tracked;

- g) Discuss how service escalations occur, and what/how will they be tracked to resolution;
- h) Discuss the company's initial and ongoing training and development and how that training will include input from university personnel'
- i) Discuss how the company measures its success of its contract performance in addition to calls.

**5.2.4 ATTACHMENT: K: METRICS AND REPORTING.** The vendor shall discuss in detail the metrics and reporting capabilities of the company.

- a) List all metrics that the company captures; including frequency and how the data will be assessed.
- b) Discuss how monthly and annual service level metrics will be provided to the university.
- c) How long are customer interactions stored for quality tracking purposes?
- d) Describe employee performance measurements; including recognition programs and corrective actions. Include the process whereby the university can request removal of a staff member for poor performance; and standard process for expectations of call center staff.
- e) How is customer satisfaction tracked and handled? Provide samples of periodic surveys for students, faculty and staff.
- f) What guarantees does your company offer if customer satisfaction or KPI's are not met?
- g) Discuss the capability for the contract administrator(s) to have the ability to run reports or pull data metrics based on volume, trends, success outcomes and user queues at any given time.
- h) At a minimum the following reports will be provided to the university on a weekly/monthly/quarterly basis (including graphs and spreadsheets). Please identify any that the company cannot provide. Discuss the company's ability to provide ad hoc reporting, provide examples.
  - By Call Agent
    - i. Call detail report
    - ii. Chat function detail report
    - iii. Activity report
    - iv. Summary Report
    - v. Unavailability Report
  - Call Center Reports
    - i. Incoming call reports
    - ii. Abandoned call report
    - iii. Presented call report
    - iv. Summary Report
    - v. Service Level Report
    - vi. Call Detail Report
    - vii. Hold Time Report
    - viii. Speed of Answer Report
    - ix. Handle Time (Call length) Report
    - x. Call Origin (Reason for call) Report
    - xi. Escalation to university Rate Report
    - xii. Customer Satisfaction Report
    - xiii. Contact Report (How student contacted center; e.g., phone, email, cat, etc.)
    - xiv. Date and Time Contacted Report (e.g., exact date and time)

**5.2.5 ATTACHMENT: L QUALITY ASSURANCE**

- a) Discuss the company's quality assurance process.
- b) Ability of the university management to remotely monitor calls in real time for quality assurance.

**5.2.6 ATTACHMENT: M TECHNOLOGY**

- a) Discuss the company’s ability to integrate with the university’s switchboard service, Cisco UCCX, to answer and route calls, as well as, any other technology requirements.

**5.2.7 ATTACHMENT: L PROJECT PLAN AND IMPLEMENTATION**

Discuss in detail the proposed plan to implement the project. The plan should provide projected dates, tasks, key milestones, university resources required including people, to start implementation in June 2024.

**6.0 CONTRACT ADMINISTRATION**

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All Contract Administration requirements are conditioned on an award resulting from this solicitation. This information is provided for the Vendor’s planning purposes. If the University accepts a proposal, a contract will be prepared by the University and signed by and the contractor(s).

**Responsibilities to the Vendor**

- **Defining Objectives and Scope:** The University will clearly define the objectives and scope of the call center. This includes determining the types of inquiries it will handle, service hours, target audience, and expected outcomes.
- **Providing Resources:** The University will be responsible for providing the necessary resources for setting up and running the call center within reason. This includes assistance with technology, infrastructure, training content, and ongoing operations.
- **Collaborating on Technology Selection:** The University will collaborate with the Vendor’s implementation team to select appropriate technology solutions. This may include call center software, telephony systems, CRM systems, and other tools required for efficient operations.
- **Ensuring Integration with Existing Systems:** If applicable, the University will assist with seamless integration of the call center with existing organizational systems such as student information systems, CRM databases, knowledge bases, and other relevant platforms.
- **Participating in Training and Onboarding:** The University will participate in training and onboarding sessions to ensure alignment in communication and processes between the call center and other departments.
- **Providing Access to Information and Policies:** The University will provide access to relevant information, policies, procedures, and knowledge bases to support call center agents in addressing inquiries accurately and efficiently.
- **Establishing Communication Channels:** The University will establish clear communication channels with the call center implementation team to provide feedback, address concerns, and make decisions throughout the implementation process.
- **Monitoring Performance and Providing Feedback:** Once the call center is operational, the University will monitor its performance against established goals and providing feedback to the call center management team. This feedback loop helps in identifying areas for improvement and ensuring alignment with organizational objectives.
- **Resolving Issues and Escalations:** The University will assist in addressing any issues or escalations that arise in the course of call center operations. This may involve providing additional resources, clarifying policies, or resolving technical issues promptly.
- **Promoting Awareness and Utilization:** The University will actively promote awareness of the call center among its stakeholders and encourage its utilization. This may involve marketing and communication efforts to highlight the benefits of the call center and educate users on how to access its services.

**6.1 CONTRACT MANAGER AND CUSTOMER SERVICE**

The Vendor shall be required to designate and make available to the University a contract manager. The contract manager shall be the University’s point of contact for contract-related issues and issues concerning performance, progress review, scheduling, and service. This individual shall be the primary contact and critical liaison between the University and the Vendor.

**Contract Manager Point of Contact**

The Vendor designate University

Name:	
Office Phone #:	
Mobile Phone #:	
Email:	

shall be required to and make available to the for project implementation. contact shall be primary person to implement the roles and

This point of the University's work with to project. (define responsibilities).

<b>Project Implementation Point of Contact</b>	
Name:	
Office Phone #:	
Mobile Phone #:	
Email:	

**6.2 UNIVERSITY CONTRACT ADMINISTRATION**

The Associate Vice Provost for Student Success or a designee shall serve as the University Contract Administrator for any contract that may arise from a RFP.

**6.3 Staffing / Personnel Requirements**

- a) **Staffing.** The contractor shall be responsible, at its sole cost and expense, to employ all personnel necessary for the efficient operation of a Bookstore in accordance with the requirements established by the University.
- b) **Organization Chart/Staffing Level.** Prior to the commencement of a contract, the contractor shall present its organization chart/staffing level for the Bookstore to NC A&T for discussion and approval to ensure there will be sufficient on-site staff to provide the required level of service. Changes or reductions to the agreed-upon staffing level shall require discussion with, and approval by the University.
- c) **Employee Conduct.** The contractor shall be responsible for the actions of its employees, agents, and independent contractors hereunder and for the payment of all taxes, wages, benefits and other costs associated with such persons. If on the University's premises, all employees, agents, and independent contractors of the contractor shall comply with all applicable University policies and procedures. The contractor shall be required to remove any such employee, agent, or independent contractor from the premises at the University's request.
- d) **Employment Laws.** The contractor shall comply with all state and federal employment laws and requirements.
- e) **ADA.** The contractor shall comply with the Americans with Disabilities Act (ADA).
- f) **Equal Employment Opportunity.** The Division of Human Resources, seeks to facilitate a welcoming and inclusive environment which supports the right of every member of the University community to learn and work in an environment that promotes fairness, equity and access to its employment and educational programs free of discrimination. Additional information regarding NC A&T's Equal Employment Opportunity/Affirmative Action Statement can be found at: <https://hub.ncat.edu/administration/human-resources/employee-relations/eeo.php>.

**6.4 TECHNOLOGY REQUIREMENTS**

- a) **Computer Equipment Compliance.** The contractor's computer equipment/software must be certified and approved by the University's IT Department in order to be put on the University's network or communication systems.

- b) FERPA Compliance. The contractor agrees that all processes fall within FERPA guidelines, and must be approved by the University Contract Administrator.
- c) Customer Data. The contractor must notify the University’s Vice Chancellor for Information Technology Services promptly of any security breach that results in the unauthorized access, disclosure, or misuse of customer data. The contractor shall, within twenty-four (24) hours of discovery, report to the University any use or disclosure of customer data not authorized in writing by the customer. The contractor’s report to the University shall identify: (i) the nature of the unauthorized use or disclosure, (ii) the customer data used or disclosed, (iii) who made the unauthorized use or received the unauthorized disclosure, if known, (iv) what the contractor has done or shall do to mitigate any deleterious effect of the unauthorized use or disclosure, (v) what corrective action the contractor has taken or shall take to prevent future similar unauthorized use or disclosure, and (vi) such other information as reasonably requested by the University. The above provisions shall be extended by contract to all subcontractors used by the contractor who are provided access to customer data by the contractor.
- d) All customer data must be kept confidential and shall not be shared or sold by the contractor.
- e) Accessibility Guidelines. If required, the contractor shall warrant that the products or services to be provided under a contract comply with the accessibility guidelines of “Section 508 of the Rehabilitation Act of 1973” as amended as of the date of a contract, and the “Web Content Accessibility Guidelines (WCAG) 2.0 or 2.1 whichever is applicable as of the date of a contract, Level AA Conformance” published by the World Wide Web Consortium, www.w3.org, at <http://www.w3.org/TR/WCAG20/>.
- f) The contractor agrees to promptly respond to and resolve any complaint arising during the term of the warranty period regarding accessibility of its products or services which is brought to its attention. The contractor shall provide confirmation to NC A&T within ninety (90) days of receiving any such complaint that the complaint has been fully resolved, and shall recertify compliance upon the University’s request.
- g) Verification. If required, the contractor shall provide credible, independent third-party verification demonstrating product compliance with Section 508 of the Rehabilitation Act of 1973 and WCAG 2.0, Level AA upon initial deployment, prior to production use by, or publication to faculty, staff, and/or students. Appropriate documentation detailing the testing, including evaluation results, will be provided at the time of initial deployment and thereafter at University’s request. The third-party providing such verification must be acceptable to the University in its reasonable discretion.

## 6.5 INVOICING

The University shall issue a purchase order at the beginning of each contract term. The contract must reference the purchase order number on each invoice issued during the contract year. Failure to reference the purchase order number of the invoice may result in late payment(s) to the contractor.

Contractor shall ensure that purchase order numbers are referenced on each invoice(s) matching the assigned purchase order. Invoices must also include; vendor remit to address, service description, quantity(s),

All invoices for services under this Agreement shall be submitted to:

**NCAT.Invoices@trustflows.com**

Or

**North Carolina A&T State University**  
**PO Box 3986**  
**Scranton, PA 18505**

## 6.6 PAYMENT TERMS

Payment terms are net not later than 30 days after receipt of correct invoice(s). The University is responsible for payments to Contractor pursuant to this Agreement.

The University does not agree in advance, in agreement, or pursuant to constitutional limitations, to pay costs such as interest, late fees, penalties or attorney’s fees. This Agreement shall not be construed as an agreement by the State to pay such costs. The

University and State shall only pay costs such as interest, late fees, penalties, or attorney’s fees as ordered by a court of competent jurisdiction.

**6.7 POST AWARD PROJECT MEETING**

After award of a contract, the vendor shall be required to meet with the University for a “kick-off” meeting. Both parties agree to have the key individuals present at the meeting that will provide the services to implement the call center and serve as key stakeholders. This meeting will take place within ten (10) business days after the award of the contract.

The University Contract Administrator shall work with the Vendor to establish periodically weekly meetings. The purpose of these meetings will be to establish and approve a project plan, review project progress reports, discuss Vendor and University performance, address outstanding issues, review problem resolution, provide direction, and discuss any other pertinent topics.

**6.8 CONTINUOUS IMPROVEMENT**

The University encourages the Vendor to identify opportunities to reduce the total cost the University. A continuous improvement effort consists of various ways to enhance business efficiencies as performance progresses.

**6.9 PERIODIC STATUS REPORTS**

The Vendor shall be required to provide project implementation reports to the designated Contract Lead on a weekly and bi-weekly basis. This report shall include, at a minimum, information concerning project phases, deliverables, work packages, anticipated risks, and notification of any significant updates that affect the project plan and call center operations. These reports shall be well-organized and easy to read. The Vendor shall submit these reports electronically in a timely manner and on a regular schedule as agreed by the parties.

The Vendor shall provide reports or access to reports about the Call Center’s performance. We would like this data to be accurate, real-time, and accessible via a software, web-based application, or portal that we can review.

Within 15 business days of the award of the Contract, the Vendor shall submit a final project plan and a sample report to the designated Contract Lead for approval.

**6.10 ACCEPTANCE OF WORK**

**6.10.1 Acceptance of Vendor’s work to upon the launch of the Call Center shall be based on the following criteria:**

- All the business requirements have been met
- All the specifications of the application
- System testing and integration
- Regression testing
- Fix all the identified errors before final test
- Finalize Launch

Performance of the work 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 University Contract Administrator.

The University shall have the obligation to notify Vendor, in writing ten (10) calendar days following completion of any work or delivery of a deliverable described in the Contract that it is not acceptable. The notice shall specify in reasonable detail the reason(s) it is unacceptable. Acceptance by the University shall not be unreasonably withheld; but may be conditioned or delayed as required for reasonable review, evaluation, as applicable to the work or deliverable. Final acceptance is expressly conditioned upon completion of all applicable assessment procedures. Should the work or deliverables fail to meet any specifications, acceptance criteria or otherwise fail to conform to the Contract, the University may exercise any and all rights hereunder, including, such rights provided by the Uniform Commercial Code, as adopted in North Carolina.

**6.10.2 Performance Measurements Post-Implementation**

By implementing this Call Center Performance Plan, the call center can effectively monitor, evaluate, and optimize its operations to deliver outstanding customer service and support while achieving organizational objectives. Here is a list of some of the KPIs, Goals, and Targets we would like a vendor achieve. We are open to discussion and reorganizing these performance measurements based on the services provided by the vendor.

**KPIs**

- Average Speed of Answer (ASA)
- First Call Resolution (FCR) rate
- Average Handle Time (AHT)
- Customer Satisfaction Score (CSAT)
- Abandonment Rate
- Agent Utilization Rate
- Service Level Agreement (SLA) compliance

**Goals and Targets**

- Achieve an ASA of less than 30 seconds.
- Maintain a FCR rate of 85% or higher.
- Keep AHT under 5 minutes.
- Maintain a CSAT score of 90% or above.
- Reduce abandonment rate to less than 5%.

The Institution plans to monitor and evaluate the vendor's performance through periodic performance reviews and reporting. We are committed to continuous improvement based on performance data and feedback.

**6.11 TRANSITION ASSISTANCE**

If a Contract results from this solicitation, and the Contract is not renewed at the end of the last active term, or is canceled prior to its expiration, for any reason, Vendor shall provide transition assistance to the University, at the option of the University, for up to ninety (90) days to allow for the expired or canceled portion of the Services to continue without interruption or adverse effect, and to facilitate the orderly transfer of such Services to the University or its designees. If the University exercises this option, the Parties agree that such transition assistance shall be governed by the terms and conditions of the Contract (notwithstanding this expiration or cancellation), except for those Contract terms or conditions that do not reasonably apply to such transition assistance. The University shall agree to pay Vendor for any resources utilized in performing such transition assistance at the most current rates provided by the Contract for performance of the Services or other resources utilized.

**6.12 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 University's Contract Administrator for resolution. Any claims by the University shall be submitted in writing to the Vendor's Contract 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.

**6.13 CONTRACT CHANGES**

Contract changes, if any, over the life of the Contract shall be implemented by contract amendments agreed to in writing by the University and Vendor. Amendments to the contract can only be through the contract administrator.



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## 7.0 ATTACHMENTS

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### ATTACHMENT A: PRICING

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Complete and return the Pricing associated with this RFP, which can be found in the table in Bonfire.

### 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://www.doa.nc.gov/form-north-carolina-general-terms-and-conditions-11-2023/open>

### 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)

### 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)

### 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)

### 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)

### ATTACHMENT H: COMPANY EXPERIENCE/BACKGROUND AND QUALIFICATIONS

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Vendor shall use this attachment to discuss as a narrative in detail the company's background and experience in meeting the scope of work outlined in Section 5.2.1 in the RFP.

### ATTACHMENT I: STAFFING AND TRAINING

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Vendor shall use Section 5.2.1 to address as a narrative in detail the company's staffing capabilities and capacity to provide the services requested in the RFP and respond as Attachment J.

### ATTACHMENT J: SERVICE

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Vendor shall use Section 5.2.3 to address as a narrative in detail the service elements of how the company will provide call center services.

### ATTACHMENT K: METRICS AND REPORTS

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Vendor shall use Section 5.2.4 to discuss in detail the metrics and reporting capabilities of the company. Vendor shall include copies of types of reports available to its clients.

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**ATTACHMENT L: QUALITY ASSURANCE**

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Vendor shall use Section 5.25 to discuss the company's quality control measurements to ensure continuous quality standards.

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**ATTACHMENT M: TECHNOLOGY**

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Vendor shall use Section 5.26 to discuss and address the technology used to perform the services and the company's expectations of any technology resources from the University to support the services.

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**ATTACHMENT N: PROJECT PLAN**

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Vendor shall discuss in detail the proposed plan to implement the project. The plan should provide a timeline of projected dates, tasks, key milestones, university resources required including people, to start implementation in June 2024.

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**CONFLICT OF INTEREST CERTIFICATION**

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*Complete the questions in Bonfire to address the Conflict-of-Interest Certification.*

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**LINK -STUDENT SUPPORT SERVICES FREQUENTLY ASKED QUESTIONS**

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Use this link to review questions frequently asked by from students, parents, faculty, and staff

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**LOBBYING ACTIVITY CERTIFICATION FOR FEDERAL GRANTS**

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The Certification for Contracts, Grants, Loans, and Cooperative Agreements and the OMB Standard Form LLL are separate documents that can be found at the following link: <https://ncadmin.nc.gov/documents/vendor-forms>.