



**Request for Proposals (RFP) – 102-359**

**Consulting Services to Implement Business Office Modernization and Transition Strategy**

**Isothermal Community College**

**May 12, 2025**

**I. INTRODUCTION**

Isothermal Community College (ICC), located in North Carolina, is seeking proposals from qualified consulting firms to implement the recommendations outlined in a Phase I Operations Report. The purpose of this RFP is to solicit proposals from consulting firms with expertise in business process modernization, internal controls, procurement optimization, technology integration, and change management to support ICC in achieving strategic alignment and operational efficiency.

**II. SCOPE OF WORK**

The selected consulting firm will be expected to:

1. Lead the implementation of business office modernization, with a focus on streamlining and minimizing manual and outdated processes.
2. Optimize procurement and financial operations to reduce redundancy and enhance efficiency.
3. Reinforce internal controls and mitigate operational risks.
4. Facilitate technology integration and system optimization, particularly with Ellucian Colleague, Etrieve, NC E-Procure, and Web Cashier.
5. Facilitate the generation of user-friendly financial performance and budget reports, including key metrics, to aid in decision-making.
6. Provide change management and staff training to ensure smooth transitions.
7. Develop and execute a formal succession and knowledge transfer plan in anticipation of the Controller's retirement.
8. Enhance leadership communication and cultural alignment between the business office and institutional leadership.
9. Consult regularly with executive leadership, the board of trustees and various committees of the board on matters related to finance, budget, auditing and operations.

**III. PROPOSAL REQUIREMENTS**

Respondents must submit a complete proposal that includes:

1. Firm Background and Qualifications:
  - a. Description of the firm, including relevant experience in North Carolina public education, higher education and/or community college environments.

- b. Knowledge of North Carolina procurement laws, regulations, and practices.
  - c. Personnel will ideally include at least one of the following: Certified Public Accountants (CPAs), Certified Managerial Accountants (CMAs), Chartered Global Management Accountants (CGMAs) or personnel with equivalent credentials with demonstrated experience in operations consulting experience, budget and forecasting, fiscal planning and analysis and performance management. (The responding firm is not required to be a registered certified public accounting firm.)
2. Project Approach:
  - a. Detailed plan for achieving the scope of work outlined in Section II.
  - b. Timeline of key milestones and deliverables.
  - c. Strategies for stakeholder engagement and staff training.
3. Project Team:
  - a. Identification of project team members, including their roles and relevant experience.
  - b. Resumes for key personnel.
4. Cost Proposal:
  - a. Itemized cost breakdown, including hourly rates and estimated total costs.
  - b. Confirmation that all time and costs are included in final pricing to avoid overruns.
5. References:
  - a. At least two references from related work performed in the last five years in North Carolina public education and/or community college environments.
  - b. Explicit affirmation that neither the responding firm nor its officers, directors and owners are debarred vendors under 01 NCAC 05B.1520.

#### IV. RFP TIMELINE

Event	Responsibility	Date and Time
RFP Release Date	College	May 12, 2025
Deadline for Questions	Vendor	May 16, 2025 @ 2:00 PM, EST
Provide Response to Questions	College	May 19, 2025
Proposal Submission Deadline	Vendor	May 23, 2025 @ 2:00 PM, EST
Evaluation Period	College	May 24, 2025 – May 31, 2025
Award Notification	College	June 3, 2025 (Anticipated)

#### V. EVALUATION CRITERIA

Proposals will be evaluated based on the following criteria:

- Demonstrated expertise and experience with business office modernization in North Carolina public education and/or community college environments. (25%)
- Completeness and feasibility of the project approach. (25%)
- Qualifications and experience of project team members. (25%)
- Cost-effectiveness and clarity of pricing structure. (15%)
- References from previous projects of similar scope and complexity. (10%)

## **VI. SUBMISSION INSTRUCTIONS (NC e-Procurement Posting Requirements and Vendor Registration)**

Proposals must be submitted exclusively through the NC e-Procurement system, in full compliance with NC e-Procurement guidelines and requirements. No alternative submission methods (e.g., hand delivery, mail, or email) will be accepted except for the required PDF copy for internal review. Responding firms must be registered vendors with NC e-Procurement prior to submission.

**Additionally, a courtesy electronic copy (PDF) should be sent to Heather Maples at [hmaples@isothermal.edu](mailto:hmaples@isothermal.edu) for internal tracking and documentation, with the subject line: "ICC Business Office Modernization RFP Submission - Attn: Heather Maples, Purchasing Coordinator."**

## **VII. TERMS AND CONDITIONS (NC e-Procurement Compliance)**

1. ICC reserves the right to reject any or all proposals, to waive technicalities and to accept the proposal deemed to be in the best interest of the institution.
2. All costs incurred in the preparation of the proposal are the responsibility of the respondent.
3. All submitted questions and responses will be made available to all registered vendors in NC e-Procurement.
4. This RFP and any resulting contract shall be governed by the procurement regulations of North Carolina and Isothermal Community College policies.  
ICC is not obligated to contract with any respondent to this RFP.
5. Proposals will be treated as confidential during the evaluation process. However, they are subject to public disclosure upon award in accordance with North Carolina Public Records Law.
6. Respondents must disclose any conflicts of interest with ICC or its affiliates.
7. The resulting contract may be renewed annually for up to a maximum of three (3) years, contingent upon satisfactory performance and mutual agreement. Either party may elect not to renew with a minimum of ninety (90) days' written notice prior to the renewal date.