

STATE OF NORTH CAROLINA

Central Carolina Community College

Request for Proposal #: 86-2025-004

OPTIONAL EMPLOYEE BENEFITS BROKER SERVICES

Date of Issue: December 17, 2024

Proposal Opening Date: January 24, 2025

At 3:00 PM ET

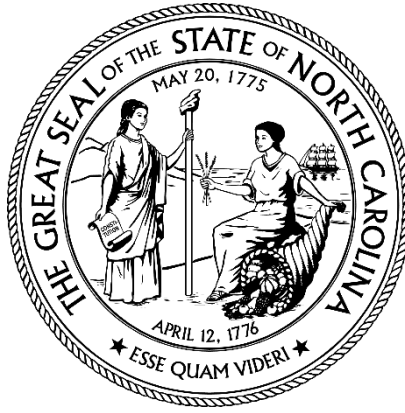
Direct all inquiries concerning this RFP to:

Brandi Hernandez

Director of Purchasing

Email: bhernandez@cccc.edu

Phone: 919-718-7419



STATE OF NORTH CAROLINA

Request for Proposal

86-2025-004

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>

Electronic responses ONLY will be accepted for this solicitation.

STATE OF NORTH CAROLINA
Central Carolina Community College

Refer <u>ALL</u> Inquiries regarding this RFP to: Brandi Hernandez bhernandez@cccc.edu 919-718-7419	Request for Proposal #: 86-2025-004
	Proposals will be opened: January 24, 2025 at 3:00 PM ET
Using Agency: Central Carolina Community College	Commodity No. and Description: 801115 - Compensation or benefits planning
Requisition No.: TBD	

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 College, or from any person seeking to do business with the College. 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 SECTION VI, ITEM #21):		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR:		FAX NUMBER:
VENDOR'S AUTHORIZED SIGNATURE*:	DATE:	EMAIL:

VALIDITY PERIOD

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

ACCEPTANCE OF PROPOSAL

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

FOR STATE USE ONLY: Offer accepted and Contract awarded this _____ day of _____, 20____, as indicated on the attached certification, by _____.

(Authorized Representative of Central Carolina Community College)

Contents

1.0	PURPOSE AND BACKGROUND.....	4
1.1	CONTRACT TERM	4
2.0	GENERAL INFORMATION	4
2.1	REQUEST FOR PROPOSAL DOCUMENT.....	4
2.2	E-PROCUREMENT FEE	4
2.3	NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS	4
2.4	RFP SCHEDULE.....	5
2.5	PROPOSAL QUESTIONS.....	5
2.6	PROPOSAL SUBMITTAL	5
2.7	PROPOSAL CONTENTS	6
2.8	ALTERNATE PROPOSALS.....	6
2.9	DEFINITIONS, ACRONYMS, AND ABBREVIATIONS	7
3.0	METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS	7
3.1	METHOD OF AWARD	7
3.2	CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION	7
3.3	PROPOSAL EVALUATION PROCESS	7
3.4	EVALUATION CRITERIA.....	8
3.5	PERFORMANCE OUTSIDE THE UNITED STATES.....	9
3.6	INTERPRETATION OF TERMS AND PHRASES	9
4.0	REQUIREMENTS	9
4.1	COST PROPOSAL.....	9
4.2	INVOICES	9
4.3	FINANCIAL STABILITY	10
4.4	HUB PARTICIPATION	10
4.5	VENDOR QUALIFICATIONS & EXPERIENCE.....	10
4.6	VENDOR REFERENCES	10
4.7	BACKGROUND CHECKS	10
4.8	PERSONNEL	11
4.9	VENDOR’S REPRESENTATIONS.....	11
4.10	AGENCY INSURANCE REQUIREMENTS MODIFICATION.....	11
5.0	SPECIFICATIONS AND SCOPE OF WORK.....	11
5.1	GENERAL.....	12
5.2	TASKS/DELIVERABLES	13
5.3	PROJECT ORGANIZATION	14
5.4	VENDOR TECHNICAL APPROACH	14
6.0	CONTRACT ADMINISTRATION	15
6.1	CONTRACT MANAGER AND CUSTOMER SERVICE.....	15
6.2	POST AWARD PROJECT REVIEW MEETINGS	15
6.3	CONTINUOUS IMPROVEMENT	15
6.4	PERIODIC MONTHLY STATUS REPORTS.....	16
6.5	ACCEPTANCE OF WORK.....	16
6.6	TRANSITION ASSISTANCE.....	16
6.7	DISPUTE RESOLUTION.....	16
6.8	CONTRACT CHANGES.....	16
7.0	ATTACHMENTS.....	17
	ATTACHMENT A: COST PROPOSAL	17
	ATTACHMENT B: INSTRUCTIONS TO VENDORS	17
	ATTACHMENT C: NORTH CAROLINA GENERAL TERMS & CONDITIONS	17
	ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION	17
	ATTACHMENT E: CUSTOMER REFERENCE FORM.....	17
	ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR.....	17
	ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION.....	17

1.0 PURPOSE AND BACKGROUND

The purpose of this Request for Proposal (RFP) is to solicit offers from qualified vendors to assist Central Carolina Community College in strategically planning, designing, and negotiating optional employee benefits programs that provide high value to employees while controlling costs. The College's optional benefits program is offered to its 420 full-time employees and includes the following employee-paid offerings:

- Life Insurance (Term Life, AD&D)
- Dental and Vision Insurance
- Flexible Spending Accounts (Medical and Dependent Care)
- Short-Term and Long-Term Disability Coverage
- Ancillary Benefits (Critical Illness, Accident, Cancer Insurance)

The selected Vendor will collaborate with the College to ensure the successful implementation of all services by September 2025, aligning with the 2026 Open Enrollment period.

The intent of this solicitation is to award an Agency Specific Contract.

1.1 CONTRACT TERM

The Contract shall have an initial term of one (1) year, beginning on the date of final Contract execution (the "Effective Date").

At the end of the Contract's initial term, the College shall have the option, in its sole discretion, to renew the Contract on the same terms and conditions for up to two (2) additional one-year terms. The College will give the Vendor written notice of its intent to exercise each option no later than three months (90 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 College 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 E-PROCUREMENT FEE

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

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

2.3 NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS

It shall be the Vendor's responsibility to read the Instructions to Vendors, the North Carolina General Terms and Conditions, all relevant exhibits and attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Vendors 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 College determines that any changes will be made as a result of the questions asked, then such decisions will be communicated in the form of an RFP addendum. The College 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 College 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 College 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.

2.4 RFP SCHEDULE

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

Event	Responsibility	Date and Time
Issue RFP	College	December 17, 2024
Submit Written Questions	Vendor	January 2, 2025 at 3:00 PM EST
Provide Response to Questions	College	January 10, 2025
Submit Proposals	Vendor	January 24, 2025 at 3:00 PM EST
Contract Award	College	February 12, 2025

2.5 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 bhernandez@cccc.edu by the date and time specified above. Vendors should enter “RFP #86-2025-004: 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 College’s response, and any additional terms deemed necessary by the College 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 State personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Vendors shall rely *only* on written material contained in the RFP and an addendum to this RFP.

2.6 PROPOSAL SUBMITTAL

IMPORTANT NOTE: This is an absolute requirement. Late bids, regardless of cause, will not be opened or considered, and will be automatically disqualified from further consideration. Vendor shall bear the sole risk of late submission due to unintended or unanticipated delay. It is the Vendor’s sole responsibility to ensure its proposal has been received as described in this RFP by the specified time and date of opening. The time and date of receipt will be marked on each proposal when received. Any proposal or portion thereof received after the proposal deadline will be rejected.

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

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

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

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

Critical updated information may be included in Addenda to this RFP. It is important that all Vendors responding 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.

2.7 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 College rejecting Vendor's proposal, in the College's sole discretion.

Vendor RFQ responses shall be submitted as one (1) document and shall include the following items and attachments 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 addressing all Specifications of this RFP, including but not limited to, Sections 4.1 Cost Proposal, 4.5 Vendor Qualifications & Experience, 4.6 Vendor References, 5.3 Project Organization, 5.4 Vendor Technical Approach. Vendor's Proposal shall be limited to twenty (20) pages, exclusive of required attachments. If the Proposal exceeds this page limit, only the first twenty (20) pages will be evaluated.
- f) Completed version of ATTACHMENT A: COST PROPOSAL
- 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

2.8 ALTERNATE PROPOSALS

Unless provided otherwise in this RFP, Vendor may submit alternate proposals for comparable Goods, various methods or levels of Service(s), or that propose different options. Alternate proposals must specifically identify the RFP requirements and advantage(s) addressed by the alternate proposal. Any alternate proposal, in addition to the marking described above, must be clearly marked with

the legend: "Alternate Proposal #86-2025-004 for 'name of Vendor'". Each proposal must be for a specific set of Goods and Services and must include specific pricing. If a Vendor chooses to respond with various offerings, each must be offered with a separate price and be contained in a separate proposal document. Each proposal must be complete and independent of other proposals offered.

2.9 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

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

3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS

3.1 METHOD OF AWARD

North Carolina G.S. 143-52 provides a general list of criteria the College 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 College'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 College 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 College to do so.

The College 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 Section VI, Paragraph 28 of the Instructions to Vendors entitled COMMUNICATIONS BY VENDORS.

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

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

3.3 PROPOSAL EVALUATION PROCESS

Only responsive submissions will be evaluated.

The College will conduct a One-Step evaluation of Proposals:

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

All proposals must be received by the issuing agency not later than the date and time specified in the RFP SCHEDULE Section above, unless modified by Addendum. Vendors are cautioned that this is a request for offers, not an offer or request to contract, and the College 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 College.

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 College will make award(s) based on the evaluation and post the award(s) to the State'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 College.

The College 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 College.

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 College:

BEST VALUE: "Best Value" procurement methods are authorized by N.C.G.S. §§143-135.9 and 143B-1350(h). The award decision is made based on multiple factors, including: total cost of ownership, meaning the cost of acquiring, operating, maintaining, and supporting a product or service over its projected lifetime; the evaluated technical merit of the Vendor's offer; the Vendor's past performance; and the evaluated probability of performing the specifications stated in the solicitation on time, with high quality, and in a manner that accomplishes the stated business objectives and maintains industry standards compliance. The intent of "Best Value" procurement is to enable Vendors to offer and the Agency to select the most appropriate solution to meet the business objectives defined in the solicitation and to keep all parties focused on the desired outcome of a procurement.

A ranking method of source selection will be utilized in this procurement using evaluation criteria listed in order of importance in the Evaluation Criteria section below to allow the College to award this RFP to the Vendor(s) providing the Best Value and recognizing that Best Value may result in award other than the lowest price or highest technically qualified offer. By using this method, the overall ranking may be adjusted up or down when considered with, or traded-off against, other non-price factors.

EVALUATION METHOD: Narrative and by consensus of the evaluating committee, explaining the strengths and weaknesses of each proposal and why the recommended awardee(s) provide the best value to the College.

All qualified proposals will be evaluated, and award made based on considering the following criteria listed in descending order of importance, to result in an award most advantageous to the College:

1. Vendor Technical Approach (Section 5.4)
2. Project Organization (Section 5.3)
3. Vendor Qualifications & Experience (Section 4.5)
4. Vendor References (Section 4.6)
5. Cost Proposal (Section 4.1)

During the evaluation process, the College may, at its discretion, request any one or all brokerage firms to make oral presentations for the purpose of clarification or to amplify the materials presented in any part of the proposal. However, brokers are cautioned that the College is not required to request clarification; therefore, all proposals should be complete and reflect the most favorable terms available from the broker. Not all brokers may be asked to make such oral presentations.

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 College 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 College:

- a) Total cost to the College
- b) Level of quality provided by the Vendor
- c) Process and performance capability across multiple jurisdictions
- d) Protection of the College's information and intellectual property
- e) Availability of pertinent skills
- f) Ability to understand the College's business requirements and internal operational culture
- g) Particular risk factors such as the security of the College'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 College; 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 College will take into consideration the degree to which Vendors have proposed or failed to propose solutions that will satisfy the College'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 College 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 College 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 COST PROPOSAL

Proposal price shall constitute the total cost to the College for complete performance in accordance with the requirements and specifications herein, including all applicable charges for handling, transportation, administrative and other similar fees. Complete ATTACHMENT A: COST PROPOSAL and include in Vendor's proposal. The pricing provided in ATTACHMENT A, or resulting from any negotiations, is incorporated herein and shall become part of any resulting Contract. Vendor shall include Cost and Commission structure of the arrangement as well as a broker able/willing to negotiate lowest possible rates for our employees.

4.2 INVOICES

Vendor shall invoice the College. The standard format for invoicing shall be Single Invoices, meaning that the Vendor shall provide the College with an invoice for each order. Invoices shall include detailed information to allow the College to verify pricing at point of receipt matches the correct price from the original date of order. The Vendor must submit one monthly invoice within fifteen (15) calendar days following the end of each month in which work was performed. Invoices must be submitted to the Contract Lead in electronic format and must be identified by a unique invoice number. All invoice backup reports and spreadsheets must be provided in electronic format.

Invoices must include an accurate description of the work for which the invoice is being submitted, the invoice date, the period of time covered, and the amount of fees due to the Vendor.

INVOICES MAY NOT BE PAID UNTIL SERVICES ARE ACCEPTED.

4.3 FINANCIAL STABILITY

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

Each Vendor shall certify it is financially stable by completing ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION. The College 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 College 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.

4.4 HUB PARTICIPATION

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

4.5 VENDOR QUALIFICATIONS & EXPERIENCE

In its Proposal, Vendor shall demonstrate at least five years of experience with public and/or private sector clients with similar or greater size and complexity to the College. Vendor shall provide information as to the qualifications and experience of key personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person.

4.6 VENDOR REFERENCES

Vendor shall provide at least three (3) references, using ATTACHMENT E: CUSTOMER REFERENCE FORM, for which it has provided Services of similar size and scope to those proposed herein. CCCC may 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 may be considered in the evaluation of the Proposal.

4.7 BACKGROUND CHECKS

Vendor and its personnel are required to provide or undergo background checks at Vendor's expense prior to beginning work with the College. As part of Vendor background, the following details must be provided to the College:

- 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 state 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 state 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.

- f) Any **sex offender registration** as found using the North Carolina Department of Public Safety Offender Public Information or similar Services.

Vendor's response to these requests shall be considered a continuing representation, and Vendor's failure to notify the College 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.

4.7.1 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 College in order to perform Services under this Contract:

YES NO

4.8 PERSONNEL

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 College. 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 College will approve or disapprove the requested substitution in a timely manner. The College may, in its sole discretion, terminate the Services of any person providing Services under this Contract. Upon such termination, the College may request acceptable substitute personnel or terminate the contract Services provided by such personnel.

4.9 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 College 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.

4.10 AGENCY INSURANCE REQUIREMENTS MODIFICATION

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

5.0 SPECIFICATIONS AND SCOPE OF WORK

The selected vendor will serve as the designated insurance broker of record for CCCC's Optional Benefits Program. The vendor must be licensed to provide brokerage services in North Carolina and operate independently, with no affiliation to insurance companies, third-party administrators, or provider networks.

The selected vendor will provide expertise in managing and optimizing the College’s optional employee benefits program, which currently includes:

Benefit	# Enrolled
Term Life/Group Term/AD&D (Employee, Spouse & Child(ren))	420
Dental	280
Vision	240
Flexible Spending Account – Medical	90
Flexible Spending Account – Dependent Care	5
Disability (Short and Long Term)	20
Ancillary (Critical Illness, Cancer, and Accident)	55

5.1 GENERAL

The College requires a vendor capable of enhancing employee benefits while improving administrative processes and ensuring regulatory compliance. The project includes evaluating and consolidating benefits programs for 420 employees and must be completed before the 2026 Open Enrollment period. Deliverables should align with the College’s operational calendar to ensure smooth implementation.

Key Improvements Desired

The College is seeking a new partner for our Optional Benefits Program. We are looking to negotiate better benefits coverage with a reduced cost barrier for our employees. Our goal is to partner with a benefits broker that can provide excellent analysis, recommendations, reporting and administrative guidance to our HR and payroll team. Excellent customer service is critical. Timely responses to inquiries and/or troubleshooting is key.

We currently have multiple carriers in our optional benefits suite and would like to consolidate the carriers to streamline benefits administration processes and streamline employee enrollment processes. To streamline our monthly billing processes, a broker that can provide consolidated billing processes and accurate invoicing is desired.

Our preferred partner would provide high-quality, versatile communications materials for employees. This includes a user-friendly self-service portal for employees of varied computer skills and communication resources both during and outside of open enrollment. A vendor that can support automated electronic employee communication plans is preferred.

We are looking for our Benefits Broker to present vendors who can provide an interface for electronic benefits administration access for HR & Payroll staff. The vendor must be capable of accepting both new enrollment and enrollment change data electronically both during open enrollment and throughout the benefit plan year (monthly). Employee self-service portal for online benefit enrollment/change data is required. Mobile friendly platform capabilities are preferred.

Easily accessible telephone support for employees as needed to complete enrollment and/or inquiries. The Benefits Broker must be able to collaborate with our IT/HR team as needed for enrollment portal troubleshooting and system improvements. Electronic data feed between the benefits portal and our ERP system are strongly preferred.

Additionally, our needs are as follows:

- Flexible Spending Accounts (Medical & Dependent Care) – A vendor who can provide auto-adjudication of copays, debit cards, excellent customer service for enrolled participants including online & mobile account access, and low administrative fees. The vendor should be able to provide prompt mailing of employee FSA/DCA cards and provide a grace period through March 31 for utilization of FSA funds.
- Dental – Review our current plan & carrier options available to reduce the employee’s cost barrier to obtaining dental insurance. Dental rates should be competitive and include excellent service coverage, including orthodontics and enhanced coverages for basic and major services. A vendor that can provide employee only, employee + spouse, employee + children, and employee + family coverage tiers. The vendor must have a robust provider network in Lee, Harnett, Chatham and surrounding Counties.

- Vision – Review our current plan & carrier options available to identify enhanced coverage for services including allowances, copays, and frames/contact lenses coverage. The option(s) reduce employee’s out of pocket cost and offer a competitive rate for participants. The vendor must have a robust provider network in Lee, Harnett, Chatham and surrounding Counties.
- Life/AD&D – Compare offerings and rates for term life, group term life, and whole/universal life. Review policies that are in multiples of salary versus age/smoker banded options to identify the most competitive rate for our employees. Enhance current limits for Spouse and Dependent Life and possibly increase guaranteed issues for new hires and during open enrollment. Portability of plans to self-pay for employee’s that exit the college is preferred. Additionally, to enhance employee recruitment and retention, an employer paid life insurance policy for employees that is included with an employee assistance program (EAP) is preferred.
- Disability - Review our current plan & new carrier options to identify similar plans or stronger benefits for a competitive cost to participants. Short and long-term disability plans that compliment the State of NC disability programs for eligible State Employees. Heighten guarantee issue and wellness credit options during open enrollment.
- Ancillary Benefits – Compare vendors who offer similar policies for better rates, increased offerings of guarantee issues, and/or wellness credits. (hospital indemnity, cancer, critical care, intensive care, long-term care, accident, disability, term life, and whole life)
- Additional Benefits – Ability to consider other voluntary benefit options at a later time.

5.2 TASKS/DELIVERABLES

The selected vendor will be responsible for the following tasks, categorized by functional areas:

- **Program Review, Strategy, and Implementation**
 - Conduct a detailed assessment of current benefits offerings, including participation rates, costs, and employee feedback.
 - Identify opportunities to consolidate carriers, streamline offerings, and reduce administrative burdens.
 - Develop a multi-year strategic plan to enhance the College’s benefits program, balancing budget constraints and employee needs.
 - Perform market research for new carriers, negotiate all insurance renewals, and ensure alignment with the College’s goals for cost and coverage.
 - Provide detailed cost/benefit analyses for vendor selection and renewal negotiations.
 - Assist with the seamless implementation and transitioning of carriers, ensuring timelines are met.
 - Deliver invoicing options for both 9-month and 12-month employees, with the ability to invoice premiums a month in advance.
 - Ensure life insurance providers grandfather current participants’ coverage without disruption.
- **System Integration and Data Management**
 - Ensure compatibility with Ellucian Colleague, including data transfer protocols for enrollment changes and billing.
 - Support real-time data accuracy.
 - Deliver flat files that match College specifications for smooth data exchange.
 - Provide robust, mobile-friendly portals for employees and administrators to manage enrollment and benefits.
 - Maintain the ability to generate and share detailed reporting, including dependent age-out data, open enrollment statistics, benefit changes, new hire participation, terminations, and billing summaries by benefit offering.
- **Employee Communication and Support**
 - Create customized benefits communication materials, including brochures, videos, and digital resources tailored to employees of varying technical literacy levels.
 - Offer mobile-friendly, self-service portals for enrollment and benefits management.
 - Provide ongoing support through toll-free phone lines, email assistance, and live or virtual enrollment sessions.
 - Develop and execute a detailed Open Enrollment timeline, coordinating on-site and virtual events as needed.
 - Provide comprehensive communication materials for employees, including electronic and printed resources.
 - Implement automated employee communication plans to support ongoing engagement and updates.
- **Compliance and Vendor Management**
 - Monitor federal and state regulations, recommending strategies to ensure compliance with new and pending requirements.

- Conduct vendor renewal analyses and facilitate marketing and vendor selection services.
- Review contracts for accuracy in rates, benefits, eligibility, and coverage definitions.
- Deliver periodic reports on claims, enrollment, and cost trends, with actionable insights for program adjustments.
- Assist in preparing documentation for internal audits or external reviews as required.
- **Strategic Planning and Performance**
 - Establish a multi-year benefits strategy with measurable financial and operational metrics to assess program success and risks.
 - Provide annual analyses of claims, utilization trends, and plan design competitiveness.
 - Recommend employee contribution rates, cost-sharing strategies, and adjustments based on market trends and legislative developments (e.g., ACA requirements).
 - Implement plan design changes to optimize coverage, reduce costs, and mitigate fiscal risks.
 - Provide updates on market trends, legislative developments, and compliance strategies.
- **Benefit-Specific Deliverables**
 - Flexible Spending Accounts (FSAs): Ensure auto-adjudication, low fees, mobile access, timely issuance of cards, and a grace period for fund utilization.
 - Dental and Vision: Recommend competitive plans with robust provider networks and enhanced coverage options, including orthodontics and frames/contact lenses.
 - Life/AD&D Insurance: Provide competitive options with portability and enhanced limits, including employer-paid life insurance with Employee Assistance Program (EAP) options.
 - Disability Insurance: Offer short- and long-term plans complementing State programs, with enhanced guarantee issue options and wellness credits.
 - Ancillary Benefits: Identify better rates or improved offerings for hospital indemnity, cancer, critical care, accident, and other ancillary benefits.

5.3 PROJECT ORGANIZATION

Vendor shall describe the organizational and operational structure it proposes to utilize for the work described in this RFP and identify the responsibilities to be assigned to each person Vendor proposes to staff the work.

Vendor's proposal shall include, in narrative, outline and/or graph form, the following information:

- Description of organizational structure (i.e. publicly held corporation, partnership, etc.)
- Description of organization's philosophy, management, and a brief company history.
- Description of contractual relationships, if any, with organizations necessary to your proposal's implementation (e.g., actuarial, data information services, etc.).
- Description of level of service and support provided by your account managers on a daily basis.
- Explanation of how your organization ensures that each account manager is educated on current market trends, legislative developments, including Affordable Care Act (ACA) requirements and how this information is communicated to your clients?
- Explanation of how your organization's experience and expertise would benefit the College during Open Enrollment and include information about process timeframes, plan recommendations, rate negotiations, and vendor selection.
- What makes your organization unique?

5.4 VENDOR TECHNICAL APPROACH

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

Vendor's proposal shall include, in narrative, outline and/or graph form, the following information:

- Explanation of approach to ensuring client satisfaction
- Project/implementation timeline overview
- Description of training resources (materials, manuals, emails, communications, etc.) provided to assist clients in educating and training their HR & Payroll staff

- Description of informational resources (materials, manuals, communications, etc.) provided to assist clients in educating their employees about Optional Benefits
- Describe approach to understanding the direction and priorities of the College and utilization of this information to anticipate the College’s need in relation to benefit plan development; and in turn, develop a strategic benefit plan
- Proposal of benefit plan design and cost benchmarks to provide market perspectives on CCCC’s Optional Benefits Program
- Explanation of distinct strategies used to create negotiating leverage for your clients
- Description of how your organization strives to streamline benefit administration for clients. Include any services you provide for automation of the benefit process (e.g., electronic capabilities - internet billing, website for clients' employees to view benefits offerings, etc.).
- Description of any wellness programs offered requiring no contribution from employees
- Explanation of vendor’s approach to compliance support and assistance as well as technical assistance for online benefits administration

6.0 CONTRACT ADMINISTRATION

All Contract Administration requirements are conditioned on an award resulting from this solicitation. This information is provided for the Vendor’s planning purposes.

6.1 CONTRACT MANAGER AND CUSTOMER SERVICE

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

Contract Manager Point of Contact	
Name:	
Office Phone #:	
Mobile Phone #:	
Email:	

The Vendor shall be required to designate and make available to the College for customer service. The customer service point of contact shall be the College’s point of contact for customer service-related issues (define roles and responsibilities).

Customer Service Point of Contact	
Name:	
Office Phone #:	
Mobile Phone #:	
Email:	

6.2 POST AWARD PROJECT REVIEW MEETINGS

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

6.3 CONTINUOUS IMPROVEMENT

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

6.4 PERIODIC MONTHLY STATUS REPORTS

The Vendor shall be required to provide Status Reports to the designated Contract Lead on a monthly basis. This report shall include, at a minimum, information concerning the work accomplished during the reporting period; work to be accomplished during the subsequent reporting period; problems, real or anticipated, and notification of any significant deviation from previously agreed upon work plans and schedules. These reports shall be well organized and easy to read. The Vendor shall submit these reports electronically using the format required by the Purchasing Agency. The Vendor shall submit the reports in a timely manner and on a regular schedule as agreed by the parties.

6.5 ACCEPTANCE OF WORK

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

The College shall have the obligation to notify Vendor, in writing ten (10) calendar days following completion of such 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 College shall not be unreasonably withheld; but may be conditioned or delayed as required for reasonable review, evaluation, installation, or testing, 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 College may exercise any and all rights hereunder, including, for Goods deliverables, such rights provided by the Uniform Commercial Code, as adopted in North Carolina.

6.6 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 College, at the option of the College, for up to three (3) months** 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 College or its designees. If the College 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 College 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.

6.7 DISPUTE RESOLUTION

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

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

6.8 CONTRACT CHANGES

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

7.0 ATTACHMENTS

****IMPORTANT NOTICE****

RETURN THE REQUIRED ATTACHMENTS WITH YOUR RESPONSE
FOLLOW THE LINKS TO ACCESS EACH ATTACHMENT

ATTACHMENT A: COST PROPOSAL

Complete and return the Pricing associated with this RFP in a separate attachment.

ATTACHMENT B: INSTRUCTIONS TO VENDORS

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

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

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

ATTACHMENT E: CUSTOMER REFERENCE FORM

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

ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR

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

ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION

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

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