



**THIS ADDENDUM DOES NOT HAVE TO BE RETURNED WITH VENDOR RESPONSE.**

**Proposal Number:** RFP 07-2025-IT001  
**Addendum Number:** #1  
**Addendum Date:** June 11, 2025  
**Agency:** The North Carolina Department of State Treasurer (NCDST or State)  
**Contract Specialist:** Elizabeth Cass  
**Opening Date/Time:** June 26, 2025, at 2:00PM ET

**INSTRUCTIONS:**

1. Please see below NCDST's responses to Vendor questions received for RFP 07-2025-IT001 Identification and Verification Services.

Question #	SOLICITATION REFERENCE	VENDOR QUESTION	NCDST RESPONSE
1.	Section 3.5.5 Optional Online Batching Services Specifications	Do you have estimated volumes for optional online batching services?	The NCDST does not currently have volume estimates for these services, as the services would be a new service for NCDST, if awarded. Please refer to Section 3.5.5 Optional Online Batching Services Specifications and provide pricing based on Vendor's proposed services.
2.	Section 3.5.5 Optional Online Batching Services Specifications	Are the outputs/search types for the optional online batching services similar to the required search types in the RFP?	Yes, the anticipated search types and search results for optional online batching would be similar to those outlined in Section 3.4.2 Vendor Search Types Requirements and Section 3.4.3 Vendor Search Results Requirements. However, if Vendor is responding to this Section, please describe Vendor's offered search types and search results for the optional online batching, as referenced in Section 3.5.5 (a).



3.	General RFP Question	Can you provide the current business process? What would you like different or improve of current business process?	<p>Please refer to Section 2.3 Summary of Problem Statement, Section 3.4 Business and Technical Requirements and Section 3.5 Business and Technical Specifications for business process and needed services.</p> <p>The NCDST RSD and UPD seeks to solicit Proposal Offers from qualified Vendors to provide NCDST with access to a Vendor's website for NCDST to conduct identification and verification searches of individuals and non-individuals. Qualified Vendors should propose services as outlined in this RFP, that ensure the NCDST meet their fiduciary responsibility to retirement members, owners of unclaimed property, and to the State of North Carolina.</p>
4.	General RFP Question	Both the RSD and UPD are listed in this RFP, are they both users of this needed service? And how so?	Yes, please refer to Section 2.1 Introduction, 2.2 Agency Background, 2.3 Summary of Problem Statement for additional information on UPD and RSD.
5.	Section 5.5.5 Optional Online Batching Services Specifications	For the optional services, is a dual award, two different Vendors, an option for contract award?	While the intent of this RFP is to award a Contract(s) to a single Vendor, the NCDST 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 NCDST to do so.
6.	Section 2.4 Contract Term	What is the Contract Term?	Please refer to Section 2.4 Contract Term.



7.	RFP Attachment G requires information on at least three client references	Our company now provides NCDST the identification and verification services that the RFP requests. Must NCDST's existing Vendor for these services provide client references?	Yes. Any Vendor submitting a proposal response should adhere to Attachment G References.
8.	RFP Section 3.5.5 requests optional batching services	Please provide: (1) NCDST's estimated monthly/annual volumes and (2) the types of information/outputs NCDST would like to receive.	Please see the response to question 1 and 2 above.
9.	Section 2.3 – Summary of the Problem Statement, page 5	Who is the current provider of these services to NCDST RSD and UPD?	LexisNexis Risk Solutions FL Inc.
10	Section 2.3 – Summary of the Problem Statement, page 5	What is the total annual value of the current contract?	Approximately \$26,400.00 for RSD and \$14,000.00 for UPD.
11	Section 3.0 – RFP Requirements and Specification, (starting on page 6)	Does the current provider's content set match what is requested in the solicitation? If there are differences, what are they?	This is a new solicitation. Current requirements or services are not applicable to this solicitation.
12	Section 3.0 – RFP Requirements and Specification, (starting on page 6)	Does the current number of users match what is requested in the solicitation? If there are differences, what are they?	Please refer to Section 3.4.1 Vendor Website Requirements.



13	Section 3.5.5 - Optional Batch Services Specification, page 14-15	Please identify the volume required in the Batch	Please see response to question 1 above.
14	Section 2	Does the State anticipate that Identity and Location Data will be integrated into an existing Identity and Access Management (IAM) system?	No.
15	Section 2	Will the State be willing to execute a Mutual Non- Disclosure Agreement (MNDA) with prospective vendors prior to the proposal submission deadline?	No, however, NCDST may consider review of Vendor NDA documentation prior to any potential Contract award as part of Contract negotiations. However, please refer to Section 5.2 Evaluation Criteria, Order of Importance Number 4.  Vendor can provide a redacted version of their proposal response with information marked as "Confidential." Please see Section 7.10 Confidentiality of Offers and Attachment B: Department of Information Technology Terms and Conditions Section 1. General Terms and Conditions, Section 18 Confidentiality.
16	Section 7	Will the State permit vendors to submit formal Exceptions to the Terms and Conditions as part of their proposal packages?	Please refer to Section 6.2.5 Vendor Errata and Exceptions.



17	Section 2	Is the State open to considering alternative methods for data delivery and variations in the number of user seats, where such alternatives may enhance operational efficiency and cost-effectiveness?	Please refer to Section 6.2.6 Alternate Offers.
18	Attachment D	Can the State provide estimated monthly volumes for the Individual and Non-Individual Searches separately for UPD and RSD?	Usage estimate breakdowns listed below are for year one only. Vendor cost must remain firm and fixed. Vendor cost must not differ by Division. Please refer to Section 4.1 Offer Costs and Attachment D Cost Form.  <u>UPD:</u> Individual – 2,000 searches/month Non-Individual – 150 searches/month  <u>RSD:</u> Individual – 2,500 searches/month Non-Individual – 00 searches/month
19	Section 2	Does the State have an estimated level of effort (e.g., number of search hours) currently associated with Unclaimed Assets/Property investigations?	The NCDST has provided estimated number of searches (see response to question 18 above).
20	Section 1	Will the State consider a 10-day extension to the RFP submission deadline to allow vendors sufficient time to prepare comprehensive responses?	NCDST may consider an extension to the RFP submission deadline prior to the offer opening should it be deemed advantageous to the NCDST. Any potential extension shall be publicly posted in the eProcurement Ariba sourcing module in the form of an Addendum.