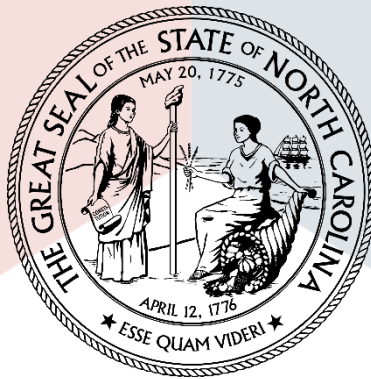


REQUEST FOR PROPOSALS
for
**PROCUREMENT ASSISTANCE
AND SUPPORT SERVICES**

Issued by
the STATE OF NORTH CAROLINA



In collaboration with



SOLICITATION NUMBER: DPC-1428523190-SA

RFP WEBSITE: <https://evp.nc.gov/>

Sandy Anderson

Procurement Lead



RFP OVERVIEW

I. INTRODUCTION

This Request for Proposals (RFP) is being issued by the State of North Carolina (“Lead State”) in collaboration with the NASPO ValuePoint cooperative purchasing program. The purpose of this RFP is to establish one or more Master Agreements for comprehensive assistant support services within the following two (2) award categories:

1. **Procurement Assistance Support Services (PASS); and**
2. **IT Research, Advisory, and Consulting Services (IT RAC).**

More information on each of these categories and subcategories is provided in Attachment B Scope of Work.

Participation in NASPO ValuePoint Master Agreements is convenient and cost-effective for eligible entities—including state departments, institutions, agencies, political subdivisions, federally recognized tribes, and other eligible public and nonprofit entities in the 50 states, the District of Columbia, and U.S. territories—and suppliers, with no membership or registration required. In 2023, contractors reported a combined **\$20 billion** in sales through NASPO ValuePoint Master Agreements awarded through cooperative solicitations like this RFP, including a combined **\$96.47 Million** in combined sales through the current Procurement of Acquisition Support Services and IT Research and Advisory Services portfolio.

More information about NASPO, NASPO ValuePoint, and the NASPO ValuePoint Lead State Model can be found at www.naspo.org and www.naspovaluepoint.org and in Attachment E, Participation Information.

NASPO ValuePoint is a division of the National Association of State Procurement Officials (NASPO), a non-profit association dedicated to advancing public procurement through leadership, excellence, and integrity. In accordance with NASPO ValuePoint’s Lead State Model™, the Lead State is issuing this RFP, evaluating responses, and establishing Master Agreements with the support and assistance of a Multistate Sourcing Team™ composed of individuals from other member states, representing a broad range of perspectives that ensure the RFP incorporates best practices recognized by public entities across the country.

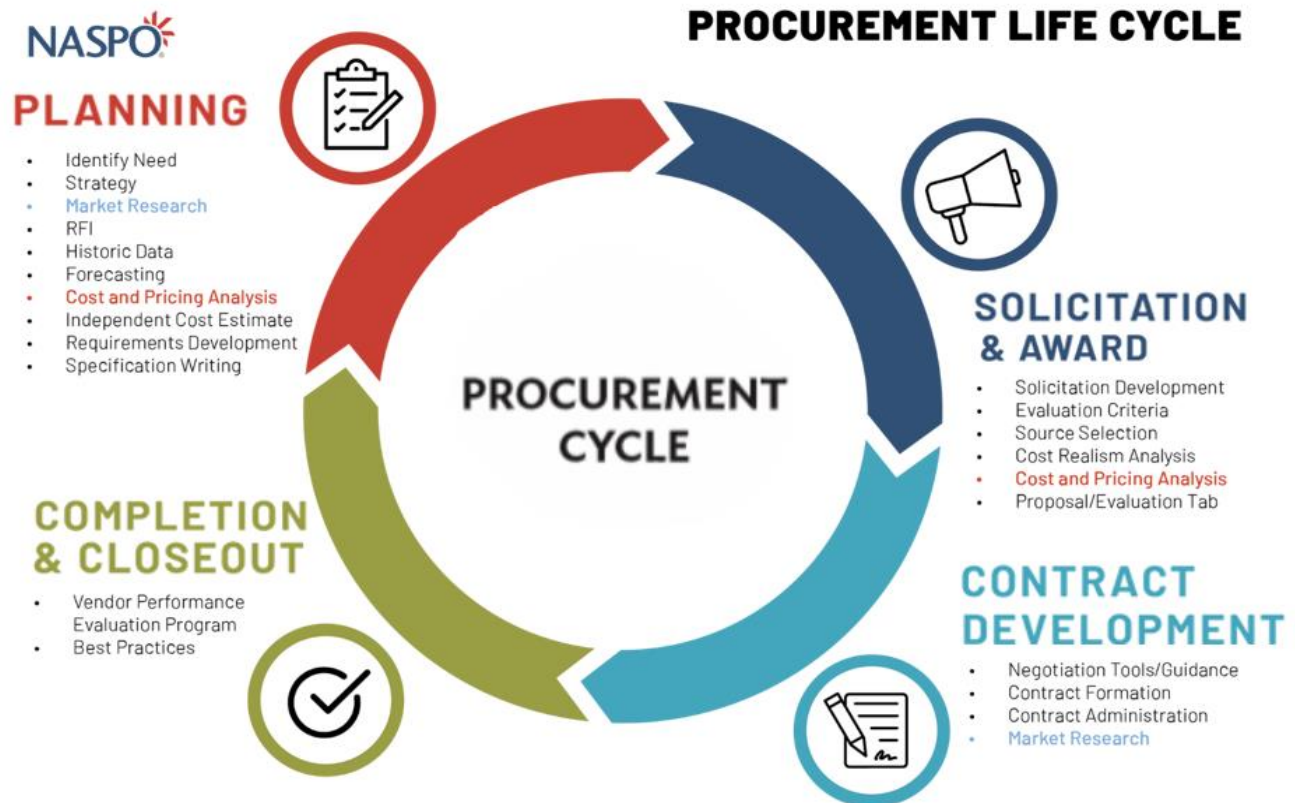
Background. There is a need for procurement assistance and support services in State government. Seasoned procurement personnel are retiring and not replaced quick enough to fill the gap. The intent of this procurement is to contract Procurement Subject Matter Experts to supplement current lack of knowledge and expertise in multiple areas of the procurement lifecycle. The solicitation will also include IT Research, Advisory, and Consulting Services.

Services include procurement planning assistance, including market research and procurement strategy recommendation; procurement document development including cost/price estimates, quality assurance surveillance plans, statements for work, synopses, solicitations, price negotiation memoranda, etc.; expert assistance in supporting proposal evaluations, including price/cost analysis or technical proposal



analysis; contract administration support services, including assistance reviewing contractor performance, development of contract modifications, and investigating reports of contract discrepancies; contract close-out assistance; competitive sourcing support, including strategic sourcing studies; privatization studies, public-private partnerships, and IT Research, Advisory, and Consulting Services.

The list of potential services within a procurement life cycle **includes but is not limited to** the following items:



The objective of this RFP is to obtain best value and achieve more favorable pricing by leveraging economies of scale than is obtainable by an individual state or local government entity. The Master Agreement(s) resulting from this procurement may be used by state governments (including departments, agencies, institutions), institutions of higher education, political subdivisions (i.e., colleges, school districts, counties, cities, etc.), the District of Columbia, territories of the United States, and other eligible entities subject to approval of the individual state procurement director and compliance with local statutory and regulatory provisions.

The initial term of the master agreement shall be three (3) years. Upon approval by the State Procurement Officer, the master agreements may be extended for up to three (3) additional years. Full term, including renewals, not to exceed six (6) years.

It is anticipated that this RFP may result in Master Agreement awards to multiple Contractors at the



Lead State's discretion.

The purpose of this solicitation is to select Contractor(s) who can offer all services for all members participating in the NASPO ValuePoint Cooperative Purchasing Program. Full coverage across the nation is our primary goal. Only proposals submitted for nationwide coverage will be considered.

II. SCOPE OF WORK

A detailed description of the Deliverables being sought through this RFP is attached as Attachment B, Scope of Work.

The scope of this RFP and its resulting Master Agreement(s) is intended to benefit all state departments, institutions, agencies, and political subdivisions and other eligible public and nonprofit entities in the 50 states, the District of Columbia, and U.S. territories. Therefore, **Offerors should not interpret the Scope of Work to be associated with or limited to any specific purchase, implementation, project, need, or program** within the Lead State or any other state or eligible entity. Proposals should be generally applicable to all potential Participating Entities and Purchasing Entities, except where specificity is requested.

III. GENERAL INFORMATION AND INSTRUCTIONS

A. RFP Contact. The following individual is the sole contact for this RFP:

Sandy Anderson, NCCM, NCPO, NCP
State Procurement Manager
1305 Mail Service Center
Raleigh, NC 27699
Sandy.Anderson@doa.nc.gov
(984) 236-0216

B. Electronic Procurement

1. The State has established the North Carolina Electronic Vendor Portal (eVP) to promote an open and transparent system for Offerors to compete for state contracts electronically. Offerors interested in responding to this solicitation must be registered. **Registration information is available at the following website: <https://evp.nc.gov/>**
2. The State will use eVP to issue the RFP and issue addenda. The State of North Carolina uses the Ariba Sourcing Tool (Sourcing Tool) to submit proposals. The State is not responsible for any delay or failure of any Offeror to receive any materials updated through the RFP process on a timely basis.
3. As part of this procurement process, Offerors are informed that awards made for this solicitation, if any, shall be done through the eVP.
4. **Sourcing Tool Instructions.** Offeror shall review all special instructions located in eVP. Offerors are responsible for ensuring that all necessary files are attached to their offer and uploaded into the Sourcing Tool prior to the proposal deadline.



Offerors are advised that they should not wait until the last minute to submit their proposal in the Sourcing Tool. Offerors should allow ample time to review their submitted proposal, including attachments, prior to the proposal deadline.

5. Questions or issues related to using the Sourcing Tool itself can be directed to the North Carolina eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM ET to 5:00 PM EST
- C. **RFP Documents.** This RFP consists of this RFP Overview, the following attachments and Exhibits, and any information or materials posted by the Lead State to the RFP website, as amended:
1. Attachment A, RFP Terms and Conditions
 2. Attachment B, Scope of Work
 3. Attachment C, RFP Evaluation Plan
 4. Attachment D, Sample Master Agreement
 5. Attachment E, Participation Information
 6. Attachment F, Protest Information
 7. Attachment G, Offeror Information, Acknowledgements, and Certifications
 8. Attachment H, Offeror Response Worksheet
 9. Attachment I, Labor Categories Price Worksheet
 10. Attachment J, Claim of Business Confidentiality
 11. Attachment K, eVP Registration
 12. Attachment L, North Carolina Execution Page (becomes contract cover page and is shown in Attachment D Sample Master Agreement).
 13. Attachment M, HUB Supplemental Vendor Info
 14. Attachment N, Customer Reference Form
 15. Attachment O, Location of Workers Utilized by Vendor
 16. Attachment P, Certification of Financial Condition
 17. Attachment Q, Certification for Contracts, Grants, Loans, and Cooperative Agreements
 18. Attachment R, Solicitation Addendum Certification
 19. Exhibit 1, Hawaii's Ts & Cs
 20. Exhibit 2, Montana's Ts & Cs
 21. Exhibit 3, Idaho's Ts & Cs
 22. Exhibit 4, Illinois' Ts & Cs
 23. Exhibit 5, Maryland's Ts & Cs
 24. Exhibit 6, Virginia's Ts & Cs
 25. Exhibit 7, North Carolina's Ts & Cs
 26. Exhibit 8, Colorado's Ts & Cs
 27. Exhibit 9, Utah's Ts & Cs
 28. Exhibit 10, Alaska's Ts & Cs
 29. Exhibit 11, Vermont's Ts & Cs

This RFP is designed to provide interested Offerors with sufficient information to submit proposals meeting minimum requirements, but it is not intended to limit a proposal's content or exclude any relevant or essential data.



D. Important Dates. All times are North Carolina Standard Time in the Eastern Standard Time (EST). If a component of this schedule, such as "RFP Close Date" is delayed, the rest of the schedule may likely be shifted by the same number of days. Any change to the RFP Schedule and Significant Dates prior to the proposal due date shall be issued by addendum.

1. **RFP Release Date:** March 4, 2025
2. **RFP Urged and Cautioned Pre-Proposal Conference:** March 18, 2025 - 12:00 PM EST
3. **RFP Question Deadline:** March 24, 2025 - 2:00 PM EST
4. **RFP Answer Deadline:** April 1, 2025 - 2:00 PM EST
5. **RFP Close Date:** April 24, 2025 - 2:00 PM EST

E. RFP Urged and Cautioned Pre-proposal Conference

March 18, 2025 – 12:00 PM EST

Microsoft Teams [Need help?](#)

[Join the meeting now](#)

Meeting ID: 286 410 871 197

Passcode: oV636hg7

Dial in by phone

+1 984-204-1487,,581443458# United States, Raleigh

[Find a local number](#)

Phone conference ID: 581 443 458#

Vendor representatives are URGED and CAUTIONED to attend the pre-proposal conference and apprise themselves of the conditions and requirements which will affect the performance of the work called for by this RFP. A non-mandatory pre-proposal conference is scheduled for this RFP. Submission of a proposal shall constitute sufficient evidence of Vendor's compliance and no allowance will be made for unreported conditions which a prudent Vendor would recognize as affecting the performance of the work called for in this RFP.

Vendor is cautioned that any information released to attendees during the pre-proposal conference, referenced above, and which conflicts with, supersedes, or adds to requirements in this RFP, must be confirmed by written addendum before it can be considered as a part of this RFP and any resulting contract

F. How to Ask Questions.

1. Read and review this RFP, including all attachments, exhibits, and addenda.
2. Questions related to the content of the solicitation, or the procurement process should be directed to the Procurement Lead (person on the title page of this document) via the Tool's Sourcing Event's message board by the date and time specified in the dates above. Offeror's will enter "RFP # DPC-1428523190-SA – Questions" as the subject of the



message. Question submittals should include a reference to the applicable RFP section. This is the only manner in which questions will be received.

- i. Questions or issues related to using the Sourcing Tool itself can be directed to the North Carolina eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM ET to 5:00 PM EST.
 - ii. Questions received prior to the submission deadline date, the State's response, and any additional terms deemed necessary by the State will be posted in the Sourcing Event in the form of an addendum 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. Offerors shall rely only on written material contained in an Addendum to this RFP.
3. Offerors are cautioned about including context in questions that may reveal the source of questions. The identity of potential Offerors will not be published with the answers, but the text of questions will be restated, to the extent possible, to exclude information identifying potential Offerors.
 4. The Lead State may refuse to answer any questions received after the Question/Answer deadline.
 5. Questions must reference the specific section of the RFP to which the question relates.

G. Questions Regarding RFP Contents.

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

If Vendors have requested modifications to the RFP including modifications to the Terms and Conditions of the RFP, the Vendor is to submit the requested modifications in accordance with Attachment A RFP Terms and Conditions. Other than through the process of negotiations under 01 NCAC 05B.0503, the State rejects and will not be required to evaluate or consider any additional or modified terms and conditions submitted with Vendor's proposal. This applies to any language appearing in or attached to the document as part of the Vendor's proposal that purports to vary any terms and conditions or Vendors' instructions herein or to render the proposal non-binding or subject to further negotiation. Vendor's proposal shall constitute a firm offer that shall be held open for the period required herein.

The State may exercise its discretion to consider Vendor proposed modifications. By execution and delivery of this RFP Response, the Vendor agrees that any additional or modified terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect, and will be disregarded unless expressly agreed to during negotiations 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.

H. Proposal Structure and Labeling

Proposals must be detailed and concise. Each Proposal must be labeled and organized in a manner that is congruent with the requirements and terminology used in this RFP and must include a point-by-point response, structured in form and reference to the RFP, addressing all requirements and the Scope of Work elements.

- I. Proposal Objectives.** One of the objectives of this RFP is to make proposal preparation easy and efficient, while giving Offerors ample opportunity to highlight their proposals. The evaluation process must also be manageable and effective.

Proposals shall be prepared in a straightforward and concise manner, in a format that is reasonably considered and appropriate for the purpose. Emphasis will be on completeness and clarity and content.

When an Offeror submits a proposal, it shall be considered a complete plan for accomplishing the tasks described in this RFP and any supplemental tasks the Offeror has identified as necessary to successfully complete the obligations outlined in this RFP.

The proposal shall describe in detail the Offeror's ability and availability of services to meet the goals and objectives of this RFP.

J. Proposal Submission Instructions

IMPORTANT NOTE: This is an absolute requirement. Late Proposals, regardless of cause, will not be opened or considered, and will be automatically disqualified from further consideration. Offeror shall bear the sole risk of late submission due to unintended or unanticipated delay. It is the Offeror's sole responsibility to ensure its proposal has been received as described in this RFP by the specified time and date of opening. Failure to submit a proposal in strict accordance with instructions provided shall constitute sufficient cause to reject an Offeror's proposal(s). Solicitation responses are subject to Sealed Bidding requirements.

Offeror's Proposals for this procurement must be submitted through the Sourcing Tool. For training on how to use the Sourcing Tool to view solicitations, submit questions, develop responses, upload documents, and submit offers to the State, Offerors should go to the following site: <https://eprocurement.nc.gov/training/vendor-training>.

Questions or issues related to using the Sourcing Tool itself can be directed to the North Carolina eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM EST to 5:00 PM EST.

Tips for Using the Sourcing Tool

1. Offerors should review available training and confirm that they are able to access the Sourcing Event, enter responses, and upload files well in advance of the date and time response are due to allow sufficient time to seek assistance from the North Carolina eProcurement Help Desk.



2. Offerors may submit their responses early to make sure there are no issues and then submit a revised response any time prior to the response due date and time. The State will only review the most recent response.
3. Offerors should respond to all relevant sections of the Sourcing Event. Certain questions or items are required in order to submit a response and are denoted with an asterisk. The Sourcing Tool will not allow a response to be submitted unless all required items are completed. The Sourcing Tool will provide error messages to help identify any required information that is missing when response is submitted.
4. Simply saving your response in the Sourcing Tool is not the same as submitting your response to the State. Offerors should make sure they complete the submission process and receive a message that their response was successfully submitted.
5. **Only Proposals submitted through the Content Section of the Ariba Sourcing Event will be considered. Proposals submitted through the Message Board will not be accepted or considered for award.**

K. Required Format and Content

All Proposals must be submitted in the Sourcing Event.

The maximum file size that the Sourcing Tool can accept is 100MB. Files larger than 100MB must be reduced into two or more files. Offeror can choose to 'zip' files and attach in Sourcing Tool. However, zip files must not exceed 100MB.

IV. OFFEROR RESPONSE

A. How to Respond.

1. Read proposal submission instructions above.
2. Prepare a proposal that:
 - a. Follows the requested format;
 - b. Includes the Solicitation Number on all materials making up the proposal;
 - c. Addresses each question and request for a response in this RFP, including all questions in Attachment H, Offeror Response Worksheet;
 - d. Clearly demonstrates your ability to meet the Scope of Work described in Attachment B; and
 - e. Includes all required submissions identified in Section IV OFFEROR RESPONSE, B. Required Submissions.
3. Submit your proposal by the RFP Close Date via the Sourcing Tool. See Section III General Information and Instructions, B. Electronic Procurement.

B. Required Submissions. The following must be submitted with your proposal:

1. A Cover Letter, must include the following: (i) a statement that confirms that the Vendor has read the RFP in its entirety, including all links, and all Addenda released in conjunction with the RFP; (ii) a statement that 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

2. Any response required to be submitted directly through the Ariba Sourcing Event;
3. Attachment G, Completed and signed Offeror Information, Acknowledgements, and Certifications
4. Attachment H, Offeror Response Worksheet
5. Attachment I, Labor Categories Price Worksheet
6. Attachment J, Claim of Business Confidentiality (if applicable)
7. Redacted copy of proposal clearly marked as such, if claiming confidential, proprietary, or protected information
8. Attachment K, eVP Registration
9. Attachment L, North Carolina Execution Page (becomes contract cover page is shown in Attachment D Sample Master Agreement)
10. Attachment M, HUB Supplemental Vendor Info
11. Attachment N, Customer Reference Form
12. Attachment O, Location of Workers Utilized by Vendor
13. Attachment P, Certification of Financial Condition
14. Attachment Q, Certification for Contracts, Grants, Loans, and Cooperative Agreements

C. Other Documents. The following are informational only and do **not** need to be submitted with your proposal:

1. RFP Overview
2. Attachment A, RFP Terms and Conditions
3. Attachment B, Scope of Work
4. Attachment C, RFP Evaluation Plan
5. Attachment D, Sample Master Agreement
6. Attachment E, Participation Information
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18. Exhibit 10, Alaska's Ts & Cs
19. Exhibit 11, Vermont's Ts & Cs



V. EVALUATION AND AWARD PROCESS

The awards are divided into two (2) categories, with experience being required

- A.** Proposals will be sealed until the RFP Close Date. After opening, proposals will be evaluated in stages as set forth in this section and further detailed in Attachment C, RFP Evaluation Plan.
- B.** Proposals will be received from each Offeror as two (2) separate volumes – (1) the Technical Proposal and (2) the Cost Proposal. Only the Technical Proposal shall be signed and dated by an official authorized to bind the firm. Unsigned technical proposals will not be considered.
- C.** No technical information shall be contained in the cost proposal. No cost information shall be contained in the technical proposal. Inclusion of any cost information in the technical proposal and/or any technical information in the cost proposal shall constitute sufficient grounds to reject Offeror's proposal.
- D.** At that date and time specified in the RFP Close Date above, unless modified by Addendum, the package containing the technical proposals from each responding Offeror will be publicly opened and the name of each Offeror announced publicly. A notation will also be made regarding whether a separate sealed cost proposal has been received. Cost proposals will remain unopened in the Sourcing Tool until cost proposals are opened and evaluated at a later date.
- E.** Upon completion of the technical evaluation, the cost proposals of those Offerors whose technical proposals have been deemed acceptable will be publicly opened. The total cost offered by each Offeror will be tabulated and become a matter of public record. 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 an Offeror's pricing position.
- F.** If negotiations are authorized and anticipated under N.C.G.S. 143-49 and 01 NCAC 05B.0503, pricing shall not be public until award.
- G.** Prior to announcement of awards and execution of Master Agreements, the Lead State will present an award recommendation to NASPO ValuePoint for approval of the proposed awards.
- H.** Following approval of NASPO ValuePoint and after a final selection(s) are made, the Lead State will issue contract award notices. Contract award notices are sent only to the Offeror or Offerors awarded the contract, and not to every person or firm responding to a Solicitation. Award notices are posted on eVP.
- I.** Upon completion of the evaluation process, the State 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 Offeror 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 State.