



*UNIVERSITY OF NORTH CAROLINA*  
**CHARLOTTE**

**STATE OF NORTH CAROLINA**

**University of North Carolina at Charlotte**

**Request for Proposals # 66-26019TS**

**Metering Software Solution**

**Date of Issue: Wednesday, October 1<sup>st</sup>, 2025**

**Proposal Due Date: Wednesday, November 19<sup>th</sup>, 2025**

**At 2:00 PM ET**

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

Trever Swint

Assistant Director of Purchasing

Email: [wswint@charlotte.edu](mailto:wswint@charlotte.edu)



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**Request for Proposals #**

**66-26019TS**

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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.**

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Vendor Name

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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**  
**University of North Carolina at Charlotte**

Refer <u>ALL</u> Inquiries regarding this RFP to: <b>Trever Swint</b> <b>wswint@charlotte.edu</b>	Request for Proposal # 66-26019TS
	Proposals will be received until: <b>Wednesday, November 19<sup>th</sup>, 2025 at 2:00 PM ET</b>

**EXECUTION**

In compliance with this Request for Proposals (RFP), and subject to all the conditions herein, the undersigned Vendor offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item within the time specified herein.

By executing this proposal, the undersigned Vendor understands that false certification is a Class I felony and certifies that:

- this proposal is submitted competitively and without collusion (G.S. 143-54),
- none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and
- it is not an ineligible Vendor as set forth in G.S. 143-59.1.

Furthermore, by executing this proposal, the undersigned certifies to the best of Vendor’s knowledge and belief, that:

- it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.

As required by G.S. 143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this RFP, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system.

As required by Executive Order 24 (2017), the undersigned vendor certifies will comply with all Federal and State requirements concerning fair employment and that it does not and will not discriminate, harass, or retaliate against any employee in connection with performance of any Contract arising from this solicitation.

G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public contracts; or awarding or administering public contracts; or inspecting or supervising delivery of the public contract of any gift from anyone with a contract with the State, or from any person seeking to do business with the State. By execution of this response to the RFP, the undersigned certifies, for Vendor’s entire organization and its employees or agents, that Vendor is not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

By executing this proposal, Vendor certifies that it has read and agreed to the **INSTRUCTION TO VENDORS** and the **NORTH CAROLINA GENERAL TERMS AND CONDITIONS incorporated herein**. These documents can be accessed from the ATTACHMENTS page within this document.

**Failure to execute/sign proposal prior to submittal may render proposal invalid and it MAY BE REJECTED.**  
**Late proposals CANNOT and will NOT be accepted.**

COMPLETE/FORMAL NAME OF VENDOR:		
STREET ADDRESS:		P.O. BOX:
CITY, STATE & ZIP:		TELEPHONE NUMBER:
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE (SEE INSTRUCTIONS TO VENDORS ITEM #21):		
NAME OF PERSON SIGNING ON BEHALF OF VENDOR:		TITLE:
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 \_\_\_\_\_, 2025, as indicated on

The attached certification, by \_\_\_\_\_.

**(Authorized Representative of UNC Charlotte)**

# Contents

- 1.0 PURPOSE AND BACKGROUND ..... 5**
- 1.1 CONTRACT TERM ..... 5**
- 2.0 GENERAL INFORMATION ..... 5**
- 2.1 REQUEST FOR PROPOSAL DOCUMENT ..... 5**
- 2.2 E-PROCUREMENT ..... 6**
- 2.3 NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS ..... 6**
- 2.4 RFP SCHEDULE ..... 6**
- 2.5 PROPOSAL QUESTIONS..... 6**
- 2.6 PROPOSAL SUBMITTAL ..... 7**
- 2.7 PROPOSAL CONTENTS ..... 8**
- 2.8 ALTERNATE PROPOSALS..... 8**
- 3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS ..... 8**
- 3.1 METHOD OF AWARD..... 8**
- 3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION ..... 9**
- 3.3 PROPOSAL EVALUATION PROCESS..... 9**
- 3.4 EVALUATION CRITERIA..... 10**
- 3.5 PERFORMANCE OUTSIDE THE UNITED STATES ..... 11**
- 3.6 INTERPRETATION OF TERMS AND PHRASES..... 11**
- 4.0 REQUIREMENTS ..... 11**
- 4.1 FINANCIAL PROPOSAL ..... 11**
- 4.2 INVOICES..... 12**
- 4.3 FINANCIAL STABILITY ..... 12**
- 4.4 HUB PARTICIPATION ..... 12**
- 4.5 VENDOR BACKGROUND AND EXPERIENCE ..... 12**
- 4.6 REFERENCES ..... 13**
- 4.7 BACKGROUND CHECKS ..... 13**
- 4.8 PERSONNEL ..... 13**
- 4.9 VENDOR’S REPRESENTATIONS..... 13**
- 4.10 QUESTIONS TO VENDORS ..... 14**
- 4.11 AGENCY INSURANCE REQUIREMENTS MODIFICATION..... 14**
- 5.0 SPECIFICATIONS AND SCOPE OF WORK ..... 14**
- 5.1 GENERAL ..... 14**
- 5.2 SPECIFICATIONS..... 15**

**5.3 PROJECT ORGANIZATION ..... 16**

**6.0 CONTRACT ADMINISTRATION ..... 16**

**6.1 CONTRACT MANAGER AND CUSTOMER SERVICE ..... 16**

**6.2 POST AWARD PROJECT REVIEW MEETINGS ..... 17**

**6.3 CONTINUOUS IMPROVEMENT ..... 17**

**6.4 PERIODIC *MONTHLY* STATUS REPORTS ..... 17**

**6.5 ACCEPTANCE OF WORK ..... 17**

**6.6 TRANSITION ASSISTANCE ..... 18**

**6.7 DISPUTE RESOLUTION ..... 18**

**6.8 CONTRACT CHANGES ..... 18**

**7.0 ATTACHMENTS ..... 19**

**ATTACHMENT A: FINANCIAL PROPOSAL ..... 20**

**ATTACHMENT B: INSTRUCTIONS TO VENDORS ..... 21**

**ATTACHMENT C: NORTH CAROLINA GENERAL TERMS & CONDITIONS ..... 21**

**ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION ..... 21**

**ATTACHMENT E: CUSTOMER REFERENCE FORM ..... 21**

**ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR ..... 21**

**ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION ..... 21**

**ATTACHMENT H: VENDOR SELF-ASSESSMENT ..... 21**

## **1.0 PURPOSE AND BACKGROUND**

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The University of North Carolina at Charlotte was established in 1965 by the North Carolina General Assembly which transformed Charlotte College, with beginnings in 1946, into a campus of The University of North Carolina. It is organized into the following eight colleges: College of Arts & Architecture; College of Science; College of Humanities & Earth and Social Science; College of Business; College of Education; College of Engineering; College of Health and Human Services; and the College of Computing and Informatics. It offers a broad array of degree programs at the undergraduate, graduate, and doctoral levels and also in graduate certificate programs.

Enrollment is approximately 31,000 with 19 percent of the students pursuing graduate degrees. The University is expected to experience continued growth in the foreseeable future.

The intent of this solicitation is to seek proposals from qualified companies that can provide an enterprise-level monitoring system to track significant changes in utility consumption and cost. This will allow the energy management team to respond more quickly to operational issues and help us use our meters as a "building health check" to prevent failures or outages.

Currently, the University has over 700 utility submeters that are remotely accessible through the campus Building Automation System (**BAS**). However, we do not have a way to monitor them all at once; we must check each meter individually, which is not an efficient process.

An enterprise utility management system with advanced reporting capabilities would also help us make better use of our data. We could gain enhanced insights into how our building portfolio's operations affect utility usage and costs and further optimize our facilities. Submeter trends have been exported to a MySQL database for future use with the future enterprise utility management system.

Finally, a new system would automate and streamline auxiliary utility billing. This process is currently done manually, which takes a considerable amount of staff time and is more susceptible to human error.

### **1.1 CONTRACT TERM**

The Contract shall have an initial term of one (1) year, beginning one (1) business day after successful implementation and project completion (the "Effective Date") or six (6) months following the Execution Date, whichever is sooner. The Vendor shall begin work under the Contract within ten (10) business days of the contract being fully executed (the "Execution Date").

At the end of the Contract's initial term, the State shall have the option, in its sole discretion, to renew the Contract on the same terms and conditions for up to seven (7) additional one-year terms. The State will give the Vendor written notice of its intent to exercise each option before the end of the Contract's then-current term. In addition to any optional renewal terms, and with the Vendor's concurrence, the State 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**

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### **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**

**ATTENTION: NC E-Procurement does NOT apply to this solicitation and the paragraph entitled ELECTRONIC PROCUREMENT of the North Carolina General Terms and Conditions does NOT apply.**

**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 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 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 State 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 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 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 State will make every effort to adhere to this schedule.

Event	Responsibility	Date and Time
Issue RFP	State	Wednesday, October 1 <sup>st</sup> , 2025
Submit Written Questions	Vendor	Wednesday, October 15 <sup>th</sup> , 2025 by 12:00 PM ET
Provide Response to Questions	State	Friday, October 31 <sup>st</sup> , 2025
Submit Proposals	Vendor	Wednesday, November 19 <sup>th</sup> , 2025 by 2:00 PM ET
Vendor Demos	Both	December 15 <sup>th</sup> , 2025 – December 19 <sup>th</sup> , 2025
Contract Award	State	TBD

**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 [wswint@charlotte.edu](mailto:wswint@charlotte.edu) by the date and time specified above. Vendors should enter "RFP # 66-26019TS: Questions" as the subject for the email. Question submittals should include a reference to the applicable RFP section.

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 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.** Vendor shall bear the risk of late submission due to unintended or unanticipated delay, or technical issue. It is the Vendor's sole responsibility to ensure its proposal has been received via the eVP as described in this RFP by the specified time and date of opening. The date and time of receipt will be electronically time stamped by the system when received. Any proposal or portion thereof received or attempted to be submitted after the proposal submission deadline will be rejected.

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>.

**Attempts to submit a proposal via mail, courier, facsimile (FAX) machine, telephone or email in response to this RFP shall NOT be accepted.**

**This will be a One-Step proposal process:**

Vendor's proposal may contain both the Technical and Financial Proposal (ATTACHMENT A) submitted for evaluation in a single file.

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 University may release an unredacted version if an open records 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 State rejecting Vendor’s proposal, in the State’s sole discretion.

Vendor RFP responses shall include the following items and attachments:

- 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; (iii) Vendor’s agreement to comply with all instructions, terms and conditions, and attachments; and (iv) contact information for Vendor’s representative responsible for this RFP.
- b) Completed and signed version of all EXECUTION PAGES, and any pages requiring vendor input.
- c) Signed receipt pages of any addenda released in conjunction with this RFP, if required to be returned.
- d) Vendor’s Proposal addressing all requirements of this RFP.
- e) Completed version of ATTACHMENT A: FINANCIAL PROPOSAL
- f) Completed version of ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION
- g) Completed version of ATTACHMENT E: CUSTOMER REFERENCE FORM
- h) Completed version of ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR
- i) Completed and signed version of ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION
- j) Completed and signed version of CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS and OMB STANDARD FORM LLL
- k) Vendor’s supporting documentation of Background and Experience. Please refer to Section 4.5
- l) Completed version of ATTACHMENT H: VENDOR SELF ASSESSMENT
- m) Vendor’s Sample Reports
- n) Proposed Network Diagram
- o) Work Plan/Schedule from contract to completion
- p) Vendor’s answers and supporting documentation for Section 4.10 QUESTIONS TO VENDOR

**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 #66-26019 TS [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.

**3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS**

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**3.1 METHOD OF AWARD**

North Carolina G.S. 143-52 provides a general list of criteria the State 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 State'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 to a single Vendor, the State reserves the right to make separate awards to different Vendors for one or more portions, to not award one or more portions or to cancel this RFP in its entirety without awarding a Contract, if it is considered to be most advantageous to the State to do so.

The State reserves the right to waive any minor informality or technicality in proposals received.

### **3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION**

While this RFP is under evaluation, the responding Vendor, including any subcontractors and suppliers, is prohibited from engaging in conversations intended to influence the outcome of the evaluation. See the Paragraph 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 State 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 State 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 State.

At the date and time provided in the RFP SCHEDULE Section above, unless modified by Addendum, the proposal from each responding Vendor will be accessed via the eVP and all offers (except those that have been previously withdrawn, or voided bids) will be noted. Since 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 noted at the time of opening. Interested parties are cautioned that proposals and their components are subject to further

evaluation for completeness and correctness and therefore may not be an exact indicator of a Vendor’s final 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 State will make an award based on the evaluation and post the award to the 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 State.

The State 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 State.

**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 State:

**Vendor Background and Qualifications 25%**

- **Company History (0-5 pts)**
- **Financial Stability (0-5 pts)**
- **Company Experience with providing solutions similar in size and scope (0-5 pts)**
- **References (0-5 pts)**
- **Similar previous project examples/samples (0-5 pts)**

**Project Organization 30%**

- **Proposed Project Schedule and/or Work Plan (0-10 pts)**
- **Project Timeframe (0-5 pts)**
- **Plan for ongoing customer service and support (0-5 pts)**
- **Ability to provide updates or revisions in a timely manner (0-5 pts)**
- **Virtual Demo (0-5 pts)**

**Technical Approach 35%**

- **Resources required from university (0-5 pts)**
- **Ability to meet Metering Solution Requirements (0-10 pts)**
- **Proposed Network Diagram (0-10 pts)**
- **Reporting functionality (0-10 pts)**

**Financial Proposal 10%**

The State will determine low cost by normalizing the scores as follows:

The proposal with the lowest cost will receive a score of XX. All other competing proposals will be assigned a portion of the maximum score using the formula:

$$\frac{\text{Financial Proposal Points Available (XX)}}{\text{the cost of the lowest cost proposal}} \times \frac{\text{the cost of the lowest cost proposal}}{\text{the cost of the cost proposal being evaluated}}$$

### 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 State 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 State:

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

Proposal price shall constitute the total cost to the State 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: FINANCIAL 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.

The University is seeking multiple options for Pricing as described below:

1. On premise Solution – The University is seeking pricing as stated below for a solution hosted on-site
2. Cloud-Based Solution – The University is seeking additional comparable pricing as stated below for a solution hosted off-site
3. Proposals must include the total cost to the University for the setup and implementation phase of this project
4. Proposals must include the total cost of the service agreement following implementation for year 1 of the contract agreement and for the seven (7) additional one-year renewal options
5. Option A – The University is seeking pricing for a complete pricing package of all seven hundred (700) meters
6. Option B – The University is seeking a partial pricing package that would include initiating the service by connecting two hundred (200) meters, phasing in an additional two hundred (200) meters in year two, another two hundred (200) meters in year three and the final one hundred (100) meters in year four

## **4.2 INVOICES**

The standard format for invoicing shall be single Invoices meaning that the Vendor shall provide the University with an invoice for each completed phase of the project. Invoices shall include detailed information to allow University to verify pricing at point of receipt matches the correct price from the proposal.

The following fields shall be included on all invoices, as relevant:

Vendor's Billing Address, Customer Account Number, NC Contract Number, Order Date, Buyer's Purchase Order Number, Manufacturer Part Numbers, Vendor Part Numbers, Item Descriptions, Price, Quantity, and Unit of Measure.

**INVOICES MAY NOT BE PAID UNTIL AN INSPECTION HAS OCCURRED AND THE SERVICES 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 State 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 State 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 BACKGROUND AND EXPERIENCE**

In its Proposal, Vendor shall:

- (1) Provide a general company overview, including company's history in providing enterprise utility management system solutions. Vendor shall also demonstrate experience with public and/or private sector clients with similar or greater size and complexity to the State.

(2) Include examples of similar completed projects and sample deliverables. Examples should help the University gain an understanding of the ongoing support model, associated costs, and highlight similar experiences integrating systems with requirements like the University's requirements.

(3) Provide information as to the qualifications and experience of all executive, managerial, legal, and professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person.

#### **4.6 REFERENCES**

Vendor shall provide three (3) references, using ATTACHMENT E: CUSTOMER REFERENCE FORM, for which it has provided Services of similar size and scope to those proposed herein, preferably from institutions of higher education or public sector. The State will 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 will be considered in the evaluation of the Proposal.

#### **4.7 BACKGROUND CHECKS**

Any personnel or agent of Vendor performing Services under any Contract arising from this RFP may be required to undergo a background check at the expense of the Vendor, if so requested by the State.

#### **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 State. 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 State will approve or disapprove the requested substitution in a timely manner. The State may, in its sole discretion, terminate the Services of any person providing Services under this Contract. Upon such termination, the State 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 State 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 QUESTIONS TO VENDORS**

Vendor shall respond to each of the following questions. Vendors are requested to keep responses concise and relevant and should not include generic marketing materials. Responses will be reviewed as part of the evaluation process.

- What resources are required of the University for the fulfillment of this project?
- Can you please explain and describe your customer support model and on-going support options offered with this solution?
- Can you please describe in detail how updates and revisions are managed?

**4.11 AGENCY INSURANCE REQUIREMENTS MODIFICATION**

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

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

**5.0 SPECIFICATIONS AND SCOPE OF WORK**

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**5.1 GENERAL**

The University is seeking an enterprise-level monitoring system to track significant changes in utility consumption and cost. This will allow the energy management team to respond more quickly to operational issues and help us use our meters as a "building health check" to prevent failures or outages. Currently, we have over 700 utility submeters that are remotely accessible through the campus **BAS** system. However, we don't have a way to monitor them all at once; we must check each meter individually, which is not an efficient process.

An enterprise utility management system with advanced reporting capabilities would help us make better use of our data. We could gain enhanced insights into how our building portfolio's operations affect utility usage and costs, further optimizing our facilities. Submeter trends have been exported to a MySQL database for future use with the future enterprise utility management system. The expectation is that the awarded vendor would connect their system to the MySQL database and organize the meter data by building/utility type, allowing for imports (or manual inputs) of square footage as well as building use type (i.e. office, classroom, dining, etc.). The ideal system would set up reporting and email alerts for meter reading irregularities. The units of measure will be Kilowatt/ kilowatt/hour for electric, Cubic Feet/Cubic Feet Per Min for water, Therms for Natural Gas, Million Btus for Hot/Chilled Water. Polling the data would occur once per day. The vendor would set up automated reports for auxiliary billing as well. Ideally, the new system would automate and streamline auxiliary utility billing. This process is currently done manually, which takes a considerable amount of staff time and is more susceptible to human error.

**5.2 SPECIFICATIONS**

The specific conditions and any specifications that the Purchasing Agency is seeking are listed below. Items offered by the Vendor must meet or exceed the listed Specifications to be considered for award. All items below are included in ATTACHMENT H: VENDOR SELF ASSESSMENT which must be completed and returned with Vendor’s Proposal.

**Priority 1 (P-1) – Mandatory, Priority 2 (P-2)– Highly Recommended, Priority 3 (P-3) – Preferred but Not Mandatory**

**GENERAL FUNCTIONALITY**

- 1. Administrative authorities and proper internal controls for financial rules P-1
- 2. Create accurate energy allocation reports for departments or tenants P-1
- 3. Verify utility billing is accurate, flag issues for engineering review P-3
- 4. Supports custom utility rates and charges & configurable line items for flexible report output P-1
- 5. Summarize charges to departments or tenants P-1
- 6. Filter tenants or line items to narrow the information and focus on key information P-1
- 7. Save billing totals to database to track trend over time P-1
- 8. Automate trouble shooting of submeters (email alerts) to ensure reading per normal operating range P-1
- 9. Automated analysis tool for submetering at enterprise and granular level P-1
- 10. Usage modeling: capable of creating and generating usage modeling reports (not specifically energy models; just overall usage at the meter P-1
- 11. KPI dashboarding/reporting for senior management P-2
- 12. Energy and power usage by building, area, or process P-1
- 13. Automatic source/measurement creation as required P-2
- 14. Analyze energy usage according to operational mode or status of processes, systems or equipment P-2
- 15. Baseline energy usage throughout the process lifecycle P-1
- 16. Energy usage P-3
- 17. Determine if a process is using excessive or unexpected energy P-3
- 18. Develop timely solutions to energy management/performance P-3
- 19. Create a competitive environment with dynamic rankings of energy usage P-2
- 20. One-click export to MS Excel P-1
- 21. Consolidate, replace or integrate with existing utility bill management service P-3
- 22. Capability to manage campus utility bills P-3
- 23. Capability to have manual meter reads input into the system P-1

**REPORT FUNCTIONALITY**

- 1. Supports net metering, meter splitting and common area allocation (such as Cone or Student Union, also split regional utility plants). Capable of aggregating several entities or tenants into a single point P-1
- 2. Energy and power usage for state reporting P-3
- 3. Steady state KPI calculation via normal report scheduling P-2
- 4. Support for interval, hourly, daily, weekly, yearly KPI calculations P-2
- 5. Heat map/carpet plot reports P-3
- 6. Ability to provide campus partners with detailed information on their utility charges which includes modules for energy analysis reporting, energy analysis dashboards, and energy billing reporting P-1
- 7. Ability to create ad-hoc reports P-1

**INTEGRATIONS**

- 1. Integrate with MS Entra for authentication P-1
- 2. Allow use of MuleSoft for integrations P-3
- 3. Integrate with MySQL database (submeter trends) P-1
- 4. Integrate with Oracle SQL database (contains space data related to the buildings) P-2
- 5. Provide API’s for integration P-3

**MAINTENANCE AND SUPPORT**

- 1. Support services for software as-needed P-1
- 2. Vendor shall provide software updates P-1
- 3. A service level agreement shall be offered to support extended hours and/or quicker response times to tech support requests P-3
- 4. Vendor shall provide multiple ways to initiate a support request including email, web page, and/or VM P-1
- 5. UNC Charlotte will be alerted when there are service interruptions P-1
- 6. Vendor shall have service escalation process P-1

**TRAINING**

- 1. Vendor shall provide both written and online training P-1
- 2. Vendor shall provide up to (12) hours of remote or on-site hands-on training for up to 8 designated users while the system is being set up, configured and programmed P-1
- 3. Vendor shall provide a dedicated manufacturer-trained technician on-site for the first (3) days of system go-live, to provide any last-minute training, programming, or configuration of the system P-3

**5.3 PROJECT ORGANIZATION**

Vendors shall provide a detailed work plan/schedule to include meeting all requirements listed above, from contract to project completion. The preferred timeline from project start to project completion is six (6) months. 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 must supply sample reports and the proposed network diagram for the University to review.

Vendor must be able to provide a virtual demo of the proposed solution and review of Vendor’s proposal for university stakeholders. See Section 2.4 for the anticipated demo schedule, this may be subject to change.

**6.0 CONTRACT ADMINISTRATION**

All Contract Administration requirements are conditioned on an award resulting from this solicitation.

**6.1 CONTRACT MANAGER AND CUSTOMER SERVICE**

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

<b>Contract Manager Point of Contact</b>	
Name:	
Office Phone #:	
Mobile Phone #:	
Email:	

The Vendor shall be required to designate and make available to the State a contact for customer service for all customer service-related issues.

<b>Customer Service Point of Contact</b>	
Name:	
Office Phone #:	
Mobile Phone #:	
Email:	

**6.2 POST AWARD PROJECT REVIEW MEETINGS**

The Vendor, at the request of the State, shall be required to meet periodically with the State 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 State encourages the Vendor to identify opportunities to reduce the total cost the State. 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 Project Status Reports to the designated Contract Lead on a Monthly basis from project start to completion. This report shall include, at a minimum, information concerning status of the project, completed actions, next steps, details about any project delays, issues that the University should be made aware of, changes in assigned staff and/or changes to the proposed work plan. 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 State 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 State 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 State may exercise any and all rights hereunder, including, for Goods deliverables, such rights provided by the Uniform Commercial Code, as adopted in North Carolina.

Acceptance of work will be measured by the Vendor’s ability to connect meter data into the system, providing the

requested dashboards and analysis tools, as well as providing the requested training to University staff to operate the system all according to the requirements listed in this Request for Proposal.

### **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 State, at the option of the State, for up to six (6) 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 State or its designees. If the State 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 State 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 State’s Contract Manager for resolution. Any claims by the State 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 State and Vendor. Amendments to the contract can only be through the contract administrator.

### **6.9 PIGGYBACKING OPTION**

All public agencies or public higher education institutions may utilize this solicitation and subsequent award to satisfy mandated competition requirements. The other public agencies and other public higher education institutions shall be individually responsible for their obligations with the awarded Vendor. Likewise, Vendor shall be responsible to the public agencies or public higher education institutions in any ensuing contract. University of North Carolina at Charlotte makes no representations, guarantees, or warranties regarding any contract made between awarded Vendor and other public agencies or public higher education institutions.

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## **7.0 ATTACHMENTS**

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### **\*\*IMPORTANT NOTICE\*\***

**RETURN THE REQUIRED ATTACHMENTS WITH YOUR RESPONSE**

EACH ATTACHMENT CAN BE ACCESSED FROM THIS LINK:

<https://www.doa.nc.gov/divisions/purchase-contract/vendor-forms>

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**ATTACHMENT A: FINANCIAL PROPOSAL**

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

The University is seeking multiple options for Pricing as described below:

1. Onsite Premise Solution – The University is seeking pricing as stated below for a solution hosted on-site
2. Cloud-Based Solution – The University is seeking additional comparable pricing as stated below for a solution hosted off-site
3. Proposals must include the total cost to the University for the setup and implementation phase of this project
4. Proposals must include the total cost of the service agreement following implementation for year 1 of the contract agreement and for the additional (4) 1-year renewal options
5. Option A – The University is seeking pricing for a complete pricing package of all 700 meters
6. Option B – The University is seeking a partial pricing package that would include initiating the service by connecting 200 meters, phasing in an additional 200 meters in year 2, another 200 meters in year 3 and the final 100 meters in year 4

**\*\*PLEASE PROVIDE IN A SEPARATE DOCUMENT(S) A DETAILED LINE-ITEM BREAKDOWN OF THE COSTS BELOW\*\***

ON PREMISE SOLUTION PRICING

OPTION A - Complete Package Pricing of all 700 Meters

1. Implementation Phase Total Cost: \$ \_\_\_\_\_
2. Service Agreement Year 1 Total Cost: \$ \_\_\_\_\_
3. Service Agreement Years 2-8 Total Cost: \$ \_\_\_\_\_

OPTION B – Phasing in Meters

1. Year 1 Implementation & Service Agreement for 200 meters \$ \_\_\_\_\_
2. Year 2 Implementation & Service Agreement for additional 200 meters \$ \_\_\_\_\_
3. Year 3 Implementation & Service Agreement for additional 200 meters \$ \_\_\_\_\_
4. Year 4 Implementation & Service Agreement for final 100 meters \$ \_\_\_\_\_
5. Service Agreement Years 5-8 Total Cost \$ \_\_\_\_\_

CLOUD-BASED SOLUTION PRICING

OPTION A - Complete Package Pricing of all 700 Meters

4. Implementation Phase Total Cost: \$ \_\_\_\_\_
5. Service Agreement Year 1 Total Cost: \$ \_\_\_\_\_
6. Service Agreement Years 2-8 Total Cost: \$ \_\_\_\_\_

OPTION B – Phasing in Meters

6. Year 1 Implementation & Service Agreement for 200 meters \$ \_\_\_\_\_
7. Year 2 Implementation & Service Agreement for additional 200 meters \$ \_\_\_\_\_
8. Year 3 Implementation & Service Agreement for additional 200 meters \$ \_\_\_\_\_
9. Year 4 Implementation & Service Agreement for final 100 meters \$ \_\_\_\_\_
10. Service Agreement Years 5-8 Total Cost \$ \_\_\_\_\_

**ATTACHMENT B: INSTRUCTIONS TO VENDORS**

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The Instructions to Vendors are incorporated herein by this reference. <https://www.doa.nc.gov/divisions/purchase-contract/vendor-forms>

**ATTACHMENT C: NORTH CAROLINA GENERAL TERMS & CONDITIONS**

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The North Carolina General Terms and Conditions are incorporated herein by this reference. <https://www.doa.nc.gov/divisions/purchase-contract/vendor-forms>

**ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION**

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Complete and return the Historically Underutilized Businesses (HUB) Vendor Information form. <https://www.doa.nc.gov/divisions/purchase-contract/vendor-forms>

**ATTACHMENT E: CUSTOMER REFERENCE FORM**

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Complete and return the Customer Reference form. <https://www.doa.nc.gov/divisions/purchase-contract/vendor-forms>

**ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR**

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Complete and return the Location of Workers Utilized by Vendor form. <https://www.doa.nc.gov/divisions/purchase-contract/vendor-forms>

**ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION**

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Complete, sign, and return the Certification of Financial Condition form. <https://www.doa.nc.gov/divisions/purchase-contract/vendor-forms>

**ATTACHMENT H: VENDOR SELF-ASSESSMENT**

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Vendors will Need to email [wswint@charlotte.edu](mailto:wswint@charlotte.edu) and request the link to complete the online Vendor Self-Assessment. The Self-Assessment is a Google Spreadsheet created for each Vendor. This MUST be completed. If not, the proposal may be considered incomplete and non-responsive. A Sample Form can be viewed here:

[https://docs.google.com/spreadsheets/d/1vPJcoQSIU1fc1n1RU\\_r1UCElazlndSo7e9cRSxuLiQw/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1vPJcoQSIU1fc1n1RU_r1UCElazlndSo7e9cRSxuLiQw/edit?usp=sharing)

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