

STATE OF NORTH CAROLINA NC COMMUNITY COLLEGE SYSTEM	REQUEST FOR INFORMATION NO. 50-2526031	
	Due Date: May 7, 2026	
Refer <u>ALL</u> Inquiries to: Grant Braley Telephone No. (919) 807-7199 Email: braleyg@nccommunitycolleges.edu	Issue Date: April 24, 2026 Commodity: 43232303 - Customer Relationship Management (CRM) Software	
E-Mail: braleyg@nccommunitycolleges.edu	Using Agency Name: NC Community College System	

RFI SUBMITTAL: Vendor's response to this RFI must be submitted through the Sourcing Tool. For training on how to use the Sourcing Tool to Vendors should go to the following site:
<https://eprocurement.nc.gov/training/vendor-training>.

NOTICE TO VENDOR

Request for Information (RFI) will be received at this office at 8:00 AM until 4:00 PM on the day of opening and then opened.

QUESTIONS

Submit written questions to Grant Braley until May 1, 2026. Questions may be submitted by e-mail to braleyg@nccommunitycolleges.edu. Please insert "**RFI No. 50-2526031- Questions**" in the subject matter of your e-mail. A summary of all questions and answers will be posted to the electronic Vendor Portal (eVP), <https://evp.nc.gov>, as an addendum to this RFI on or about May 6, 2026.

EXECUTION

VENDOR NAME:	E-MAIL:	
STREET ADDRESS:	P.O. BOX:	ZIP:
CITY & STATE:	TELEPHONE NUMBER:	TOLL FREE TEL. NO:
TYPE OR PRINT NAME & TITLE OF PERSON SIGNING:	FAX NUMBER:	
AUTHORIZED SIGNATURE:	DATE:	

1.0 EXECUTIVE SUMMARY

The Programs and Student Services Division of the North Carolina Community College System Office (NCCCSO) is responsible for leading and supporting systemwide strategic enrollment management, student access, and student success initiatives across the fifty-eight (58) North Carolina Community Colleges. This includes advancing tools, technologies, and services that enhance recruitment, enrollment, onboarding, and student engagement. See www.ncccommunitycolleges.edu for more information.

The State of North Carolina is developing plans to enhance and modernize student engagement and enrollment infrastructure across the North Carolina Community College System (NCCCS). As part of this effort, the NCCCSO Programs and Student Services Division is exploring scalable solutions that enable a more personalized, efficient, and data-informed approach to recruitment and student lifecycle management, while also supporting consistency and alignment across institutions.

This Request for Information (RFI) is intended to collect information and recommendations regarding Software as a Service (SaaS) solutions that provide enhanced functionality for communications, event management, application submission, workflow automation, and data analytics aligned with the full student lifecycle (recruitment through completion). This includes capabilities that support colleges' engagement with businesses, employers, and external partners, such as workforce outreach, work-based learning coordination, and ongoing employer relationship management. The RFI also seeks insight into implementation approaches that can be standardized and scaled, integration capabilities across common enterprise systems, and best practices for supporting colleges at varying levels of CRM maturity within a unified framework.

The State requests detailed, point-by-point responses demonstrating how your firm would address the items outlined in the following sections of this RFI. Responses should include descriptions of system capabilities, implementation strategies, and support models, with a particular emphasis on approaches that enable the development of a shared, systemwide "baseline" or "golden image" configuration. The State is specifically interested in solutions that can be deployed as a common template across all 58 colleges, allowing for local flexibility where appropriate, but grounded in a consistent, scalable architecture that promotes efficiency, reduces duplication, and accelerates adoption across the system.

This process is intended to inform a future procurement strategy that prioritizes a cohesive, system-level solution. The State is exploring approaches that would support broad adoption of a common platform and implementation model, rather than a decentralized, institution-by-institution selection process, in order to maximize scale, consistency, and long-term sustainability across the NCCCS.

2.0 RFI PROCEDURES

A. Schedule

Respondents will have approximately two (2) weeks from the date of issuance to prepare and submit their responses to this RFI.

All responses must be received by the North Carolina Community College System Office no later than May 13, 2026, at 4:00 PM Eastern Time (ET). Responses received after this deadline may not be considered.

B. Clarification Questions

Clarification questions will be accepted until May 1, 2026, as specified on the cover sheet of this RFI. All questions must be submitted in writing. An addendum containing any general clarification questions and their answers will be issued as an addendum to this RFI.

C. Response

The State recognizes that considerable effort may be required to prepare a response to this Request for Information (RFI). However, this RFI is issued for informational and planning purposes only and does not constitute a request for services or a commitment to procure. Respondents shall bear all costs associated with the preparation and submission of their responses.

The State expects concise, detailed, and point-by-point responses to each of the RFI items identified in the sections that follow. The State is not seeking marketing materials, brochures, or generic (“boilerplate”) responses. Instead, responses should clearly articulate how the respondent’s proposed solution(s) and approach would support the State’s goals for enhancing student recruitment, enrollment, and engagement across the North Carolina Community College System.

1. Responses should include, at a minimum:

a. Solution Overview and Alignment

A clear description of the proposed solution(s), including how the platform supports the full student lifecycle (recruitment through enrollment and student engagement) as well as colleges’ engagement with businesses, employers, and external agencies (e.g., workforce partners, community-based organizations, and public agencies). Responses should describe how the solution aligns with the State’s strategic enrollment management objectives and supports a consistent, systemwide approach that can be deployed across all fifty-eight (58) colleges.

b. Understanding of Business Needs

A demonstrated understanding of the State’s goals, including the diverse needs of the fifty-eight (58) community colleges and their external partners, and how the proposed solution would address those needs in a scalable, flexible manner. Responses should specifically address how the solution can support a shared, system-level “baseline” or “golden image” configuration that enables broad adoption across colleges while allowing for appropriate local customization.

c. Technical Specification

Descriptions of the vendor’s solution capacity and approach to the following technical specifications, including support for integration with enterprise systems, interoperability with external partner systems (e.g., employers and workforce agencies), and the ability to implement and maintain a standardized, scalable architecture across all 58 institutions.

SECURITY & COMPLIANCE		
Requirement	Description	Notes/Cost
Supports Single Sign-On (SSO)		
Multi-Factor Authentication (MFA)		
Role-Based Access Control (RBAC)		
Data encryption (at rest & in transit)		
Audit logs and activity tracking		
FERPA compliance support		
SOC 2 / other certifications		
Role-based access, privacy, & security settings		
VPAT Statement for ADA Guidelines		
Fraud Detection		

INTEGRATION & APIS		
Requirement	Description	Notes/Cost
REST API availability		
Webhook/event support		
Data import/export (CSV, JSON, etc.)		
Real-time data synchronization		
Middleware compatibility (e.g., iPaaS)		
Pre-built Integration with Ellucian Colleague		
Pre-built Integration with Ellucian Banner 9		
Pre-built Integration with Ellucian Banner Go		
Pre-built Integration with Instructure Canvas		
Integration with CFNC (College Foundation of North Carolina)		
Integration with third party vendors (Parchment, Scribbles , Clearinghouse, CFNC, Diploma Sender)		
Active Directory		
DATA MANAGEMENT & REPORTING		
Requirement	Description	Notes/Cost
Custom objects and fields		
Data validation rules		
Duplicate detection tools		
Standard reporting dashboards		
Customized reporting capability		
Ad hoc reporting capability		
Predictive analytics / AI insights		
Data export capabilities		
System level reporting for analysis		
CONFIGURATION & WORKFLOW AUTOMATION		
Requirement	Description	Notes/Cost
Workflow automation engine		
No-code configuration tools		
Custom business rules		
Task automation and alerts		

Ongoing Technincal Support		
Approval workflows		
Standardized Templates (for workflows)		
AUTOMATION & AI		
Requirement	Description	Notes/Cost
Predictive student risk scoring		
Automated outreach campaigns		
AI-driven recommendations		
Chatbot or virtual assistant		
AI Workflows and tasks		
USER EXPERIENCE & ACCESSIBILITY		
Requirement	Description	Notes/Cost
Mobile app (iOS/Android)		
Responsive web interface		
Accessibility compliance (WCAG)		
Offline access (external user experience)		
PERFORMANCE & ARCHITECTURE		
Requirement	Description	Notes/Cost
Cloud-based architecture		
Uptime SLA (%)		
Disaster recovery plan		
Backup frequency and retention		
Scalability approach		
STUDENT/CUSTOMER MANAGEMENT		
Requirement	Description	Notes/Cost
Capacity to group students/customer by status		
Tracks student/customer response to notifications		
Student/customer ability to track app status		
Customizable application workflows		
Create campaigns and distribution list		
Alumni relations options		
Donor tracking options		

STUDENT ENGAGEMENT CAPABILITIES (KEY SECTION)		
Requirement	Description	Notes/Cost
Student lifecycle tracking		
Early alert system		
Case management		
Appointment scheduling		
Communication tracking (email/SMS)		
Check in or integration options (i.e. Queueless)		
Alumni Relations/Donor Tracking		
Accepting Payments		
Texting Capability		
Single portal for application submission		
Customizable application workflows		
Capacity for document uploads (docx, pdf, jpeg, png)		
EVENT MANAGEMENT		
Requirement	Description	Notes/Cost
Event scheduling tool		
Automated event reminder		
Attendance tracking		
Survey Events Feedback		
Event Sites		

d. Implementation Approach and Support Model

An overview of implementation methodology, timeline considerations, onboarding strategies, and ongoing support services. Respondents should address how they would support a coordinated, systemwide rollout across all fifty-eight (58) colleges, including the development and deployment of a shared “baseline” or “golden image” configuration. Responses should also describe how the approach would accommodate colleges at varying levels of CRM maturity, including those without existing CRM platforms, while ensuring consistent adoption and integration with employer and external partner engagement functions.

e. Scalability and Flexibility

An explanation of how the proposed solution can scale across multiple institutions of varying sizes and adapt to evolving system and workforce needs. This should include the ability to support a common, system-level architecture that can be deployed across all 58 colleges, while allowing for appropriate local flexibility. Responses should also address how the solution can expand to support additional functional areas, including enhanced engagement with businesses, employers, and external agencies.

f. Total Cost Considerations (Estimated)

High-level information regarding total cost of ownership, including implementation, licensing, training, and ongoing support. Responses should reflect cost efficiencies associated with a coordinated, systemwide approach (e.g., shared services, common configuration, or economies of scale across 58 colleges), as well as considerations for supporting employer and external partner engagement functionality. Include information on maintaining compliance with emerging industry standards and regulatory requirements.

ITEM	DESCRIPTION	YEAR 1 COST	YEAR 2 COST	YEAR 3 COST
1	Software Fee			
2	Configuration, Integration Services			
3	Training			
4	Technical Support			
5	Other Costs (must be itemized in detail)			

g. Exceptions and Recommendations

Identification of any exceptions to the State’s outlined requirements, along with recommended alternatives or enhancements based on industry best practices.

Responses should also define all services required to successfully implement and sustain the proposed solution, including training, change management, and continuous improvement support.

2. Multiple Responses

Multiple responses will be accepted from a single vendor provided that each response is comprehensive, meets all of the state’s requirements, and is truly unique. Please place in separate envelopes and clearly mark responses as “Response #1, Response #2, etc.

3. Late Offers

Regardless of cause, late offers will not be accepted and will automatically be disqualified from further consideration. It shall be the Vendor’s sole risk to ensure delivery at the designated office by the designated time.

3.0 CONFIDENTIAL INFORMATION

In accordance with 09 NCAC 06B.0103 the State may maintain confidentiality of certain types of information described in N.C. Gen. Stat. 132-1 et. seq. Such information may include trades secrets defined by N.C. Gen. Stat. 132-1.2. Respondents may designate appropriate portions of its response confidential, consistent with and to the extent permitted under the Rules and Statutes set forth above, by marking the pages containing confidential information with boldface type at the top and bottom of each such page stating “CONFIDENTIAL.” By so marking any page, the Respondent warrants that is has formed a good faith opinion, having received such necessary or proper review by counsel and other knowledgeable advisers that the portions marked confidential meet the requirements of the Rules and Statutes set forth above. The State may serve as custodian of Respondent’s confidential information and not as an arbiter of claims against Respondent’s assertion of confidentiality. If an action is brought pursuant to N.C. Gen. Stat. 132-9 to compel the State to disclose information marked confidential, the Respondent agrees that it will intervene in the action through its counsel and participate in defending the State, including any public official(s) or public

employee(s). The Respondent agrees that it shall hold the State and any official(s) and individual(s) harmless from any and all damages, costs, and attorney's fees awarded against the State or official or individual in the action. The State agrees to promptly notify the Respondent in writing of any action seeking to compel disclosure of Respondent's confidential information. The State shall have the right, at its option and expense, to participate in the defense of the action through its counsel. The State shall have no liability to Respondent with respect to the disclosure of Respondent's confidential information ordered by a court of competent jurisdiction pursuant to N.C. Gen. Stat. 132-9 or other applicable law.

All information received in response to the RFI that is marked Confidential will be handled accordingly. The Department shall not be liable for or suffer any consequential damages for any proprietary information submitted and not properly identified. Proprietary information will be safeguarded in accordance with the applicable state regulations.