

BID ADDENDUM

UNC System Office Bid Number: **68-SOCC0626**
 Prospective Bidder:
 Bid Opening Date/Time: June 30, 2026, at 10:00 a.m. EDT
 Addendum Number: **02**
 Addendum Date: June 22, 2026

This addendum is issued pursuant to UNC System Office RFP 68-SOCCS0326 to provide responses to properly submitted vendor questions. The questions and responses are:

RFP Reference Section	Question	Response
N/A	Has the current contract gone full term?	Current contract expiration date is August 31st, 2026
N/A	Have all options to extend the current contract been exercised?	Yes.
N/A	Who is the incumbent, and how long has the incumbent been providing the requested services?	ACD Direct, Inc has been performing regular business hour call services for one year following an internal reduction in force.
N/A	How are fees currently being billed by any incumbent(s), by category, and at what rates?	PBS North Carolina declines to answer this question.
N/A	What estimated or actual dollars were paid last year, last month, or last quarter to any incumbent(s)?	PBS North Carolina declines to answer this question.
N/A	What is the minimum required total call capacity?	PBS North Carolina requires a minimum of two operators to answer calls at all times.
N/A	What is the minimum simultaneous inbound call capacity?	PBS North Carolina requires a minimum of two operators to answer calls at all times.
N/A	What is the maximum wait time?	15 minutes
N/A	What is the maximum hold time?	5 minutes
N/A	What percentage of inbound calls must be answered by a live operator?	90%
N/A	What percentage of calls must be resolved without a transfer, second call, or a return call?	80%
N/A	What is the maximum percentage of calls that can be terminated by the caller without resolution?	0% with exceptions to calls that violate misconduct policies
N/A	Is there a minimum or maximum number of operators and supervisors?	Minimum 2 operators with 1 supervisor

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N/A	What are the required language options?	English
N/A	What is the required degree of dedication for the call center? (Can the call center work on other contracts at the same time as this one)?	No.
N/A	What is the required degree of dedication for the operators? (Can the operators assigned to this contract work on others at the same time as this one)?	No.
N/A	What was your average monthly call volume over the past year?	Approx. 250 per week
N/A	What is the current number of seats for operators and supervisors at your existing call center?	2 operators and 1 supervisor
N/A	What is the current average wait time for phone calls?	PBS North Carolina declines to answer this question.
N/A	What is the current average handle time for phone calls and other types of communications?	Approx. 5-12 minutes
N/A	What is the current average after-call work time for operators?	PBS North Carolina needs further detail to answer this question.
N/A	Over the past year, what is the percentage of calls received in English versus non-English?	99.5% English, 0.5% Spanish
N/A	Over the past year, what percentage of calls received were in Spanish?	0.5% Spanish
N/A	What time of day, days of the week, or times of the year do calls typically peak?	Mid-day, Monday-Wednesday, End of Quarter and End of Calendar Year
N/A	If there was a previous solicitation for these services, what was its title, number, release date, and due date?	There is not a previous solicitation for these services.
N/A	Why has this bid been released at this time?	To solicit call center agency staffing services.
N/A	When is the anticipated contract start date?	To be determined.
N/A	When is the anticipated award date?	To be determined.
N/A	When is the anticipated go-live date?	To be determined.
N/A	Are bidders permitted to deviate in any way from any manner of quoting fees you may be expecting? For example, if there is a pricing page in the RFP, can bidders submit an alternate fee structure? If there is no pricing page in the RFP, do you have any preference	Yes.

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	for how bidders should quote fees or can bidders create their own pricing categories?	
N/A	Please describe your level of satisfaction with your current or recent vendor(s) for the same purchasing activity, if applicable.	PBS North Carolina declines to answer this question.
6.3.3 OFFER SUBMITTAL	Solicitation states: "It is the Vendor's sole responsibility to upload their offer to the Ariba Sourcing Module". Can you please define the exact Posting ID or Posting Title. We have been unable to locate the solicitation within the Ariba Portal. What identifiers should we find it under? Thank you!	Please disregard the reference to the Ariba Sourcing Module. 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 .
3	Are you only looking for vendors to provide solutions in the US, or are you open to outsourcing? Although we do provide US based agents, would you like to see more inexpensive options Near or Off shore?	US, with North Carolina agents preferred
3	Is there any need or thoughts on AI (Agentic) agents being used?	No.
General Question	1. Is this a new initiative, or does the PBC NC have an incumbent on this? If there is an incumbent, please disclose their names and, if possible, provide the incumbent's proposals along with their cost proposals to facilitate competitive pricing. 2. What is the estimated budget for this contract? If unknown, please provide previous spending. 3. Please specify the recently calculated average annual/monthly/weekly inbound call volume. 4. Please provide the average daily call volume by month, including any seasonal fluctuations. 5. What were the peak daily call volumes experienced during the last 12 months? 6. Please provide historical call volumes during pledge drives and fundraising campaigns. 7. What is the current Average Handle Time (AHT) for inbound calls? 8. What is the current Average Speed of Answer (ASA)? 9. What is the current call abandonment rate?	Please see other answers.

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	10. What is the current average wait time for phone calls? 11. How many agents currently support PBS NC's call center operations? 12. How many FTEs are currently assigned to Call handling, Supervisory functions, Quality Assurance, Reporting/Administration? 13. Are there any minimum staffing requirements or required service levels that the awarded vendor must maintain? 14. Will PBS NC provide access and training for Blackbaud Raiser's Edge NXT, Luminate Online, MVault/Passport? 15. Is there an existing knowledge base, call scripts, and training documentation available for onboarding? 16. What telephony platform is currently being used? 17. Will the vendor be required to provide telephony infrastructure, or will agents utilize PBS NC's existing systems? 18. Are there required Service Level Agreements (SLAs) for Call answer rate, Speed to answer, Abandonment rate, First Call Resolution and Voicemail response times? 19. How many pledge drives occur annually? 20. How many days per year is 24-hour pledge support anticipated? 21. Does PBS NC expect dedicated agents for pledge events or an on-demand staffing model? 22. Can PBS NC clarify whether the awarded contractor is expected to provide and manage the telephony/call center platform (including call routing, IVR, voicemail, recording, and reporting), or whether PBS NC will provide the telephony infrastructure and the contractor is only expected to provide staffing resources? 23. It is our understanding that the vendor can provide services remotely (anywhere in the U.S.). Is it correct? 24. Refer to "Offer Organization - Vendor Response to Specifications	
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	and Requirements” it is our understanding that the vendor need to cover “Section 3.0 RFP Requirements and Specifications”. Is it correct? 25. Is it possible for the PBS NC to extend the proposal due date?	
N/A	Could you provide historical and projected call volumes, including any seasonal fluctuations (e.g., pledge drives)?	Average weekly call volume is approx. 250 calls per week, with Drives 600-800.
N/A	Are there any expected service levels or performance targets (e.g., average speed of answer, abandonment rate, or response time for voicemails)?	PBS North Carolina requires calls to be answered within the first two minutes with voicemails being handled within 24 hours.
2.3	Can PBS NC clarify expectations for 24/7 coverage during pledge drives, including duration and anticipated call volumes during these periods?	PBS North Carolina will be expecting 24/7 coverage year round for the after ours pledge line as a fundraising function. This is a preferred, but not required, scope of this RFP.
N/A	Can PBS NC provide historical or expected average handle time (AHT), including any after-call work requirements?	PBS North Carolina declines to answer this question.
3.4.1	Will PBS NC provide system access, user licenses, and training for Raiser’s Edge NXT, Luminate Online, and MVault, or should this be included in the proposed solution?	Yes, training will be provided in these systems by PBS North Carolina.
3.4.1.	Can PBS NC clarify the expected payment processing workflow and whether secure payment tools will be provided or must be supplied by the contractor?	The agent (vendor) will be responsible for handling calls including the call recordings, which may include donors providing cardholder information during those calls. The vendor must be able to mask all cardholder data received during the call as part of the call recording process. The vendor may either use their own script and API hook into our donor management system for entering cardholder data, or if the appropriate controls are in place, we can create authorized user accounts for entering this data directly into our donor management system.
N/A	Is PBS NC currently using an external call center provider, and if so, will transition support and knowledge transfer be available?	Yes, PBS North Carolina is using an external call center provider. If an alternative provider is selected, transition support will be provided by PBS North Carolina.
Section 3.4 – Business and Technical Requirements, Section 3.4.1	We have LARGE experience in donor relations and fundraising in the Political and Private space. However we do not work on the required systems. Blackbaud Raiser’s Edge NXT Blackbaud Luminate Online MVault (PBS Passport management	No.

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	system - if don't have exact experience in these systems will this disqualify our RFP.	
Section 3.4.1 Business and Technical requirements	Average inbound calls per day/month? Average voicemails per day? Peak call volume during pledge drives? Average handle time (AHT)? Current staffing levels/FTEs? Service-level targets (e.g., 80/20)? Call volume by donation, Passport support, and general inquiries? Without these metrics, it is difficult to accurately present staffing model and price bid this RFP	Approx. 250 calls per week with 600-800 calls during pledge drives. Average handle time is 5-12 minutes. Current staff consists of 2 operators and 1 supervisor. 90/10 expected service-level targets. Call volume is evenly distributed amongst donation support, Passport support, and general inquiries.
Section 3.4 - Business and Technical Requirements	Volumes & patterns: For the past 24 months, please provide monthly inbound call and voicemail volumes (with any available segmentation by call type, campaign, or program), average handle time by call type, and hourly/daily/weekly arrival patterns including seasonality and peak periods.	Approx. 250 calls per week with 600-800 calls during pledge drives. Average handle time is 5-12 minutes. Peak periods at end of quarter and end of calendar year.
Section 3.4 - Business and Technical Requirements	Pledge-drive & donations: Please provide historical pledge-drive volume data (call volume increases, staffing used, peak hours, and duration) and donation transaction volumes by type - phone and online donations, pledge payments, renewals, sustainer changes, cancellations, and payment/card updates.	PBS North Carolina declines to answer this question due to staffing restraints to pull this detailed data analysis.
Section 3.4 - Business and Technical Requirements (Optional 24- Hour Pledge Line)	24-hour pledge line: Is the optional 24-hour pledge line included in the initial award scope, or may it be awarded separately?	Potentially included in initial scope if service is provided.
Section 3.5 - Business and Technical Specifications	Service levels & reporting: What are the required service levels, response/abandonment targets, voicemail turnaround times, and quality expectations - and what operational reports are currently used to manage these services?	PBS North Carolina requires calls to be answered within the first two minutes with voicemails being handled within 24 hours. 90% of calls should be answered with only 80% needing a secondary call or outreach. All reporting should be provided by the vendor. Current reports are provided by ACD Direct, Inc., the existing vendor.
Section 3.4 - Business and Technical Requirements	Staffing & commitment: What are the current FTEs, seats, supervisors, and support roles, and what minimum staffing/volume commitment or	Minimum 2 operators with 1 supervisor

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	guaranteed monthly workload should vendors assume for pricing?	
Section 2.2/2.3 - Agency Background & Problem Statement	Incumbent: Is there a current provider for these services? If so, please describe the scope, staffing model, service levels, and any known performance gaps or transition considerations.	ACD Direct, Inc. is the current provider that provides service during regular business hours as well as service for the 24-hour pledge line. Current regular business hours services have 2 operators and 1 supervisor on call. Staffing for the 24-hour pledge line varies based on volume.
Section 7.1 - Vendor Utilization of Workers Outside of the U.S.	Delivery location: Is U.S.-based delivery required for all services, or may nearshore/offshore delivery be proposed for any portion of the scope?	No deliveries are required for this scope of work.
Section 3.4 - Business and Technical Requirements	Systems & access: What telephony, CRM, donation-management, ticketing, knowledge-base, reporting, and workforce-management platforms are used - and will PBS NC provide access and licenses, or should the vendor include those costs in its proposal?	Blackbaud Raiser's Edge NXT, mVault, and Luminate Online are the three platforms we use. Access to these systems will be provided. All other systems tied to the scope of work must be provided by the vendor.
Section 3.2 - Security Specifications	Payment handling: Will payment processing be handled directly by agents, through PBS NC systems, or through secure payment technology that prevents agents from accessing full card data?	Please see the response noted in question 42. The agents will be handling cardholder data directly, while the processing will occur through our donor management system.
Section 3.3 - Enterprise Specifications	Documentation & implementation: What technical, security, compliance, and data-protection documentation must be submitted, and what implementation timeline is anticipated (transition, training, systems access, testing, and go-live)?	Please see page 10 of the RFP.
Section 4.1 - Offer Costs	Billing model: What billing or pricing model does the agency prefer or expect - for example per FTE, per payroll hour, per worked hour, per login hour, per handled/productive hour, per transaction, commission, or a blended model?	At vendor discretion
Section 2.0 - Purpose of RFP	Anticipated changes: Are any changes to scope, volume, pledge-drive strategy, technology, or service expectations anticipated during the initial contract term?	No.
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RFP Section: 2.1, 2.3, and 4.0	Attachment D (Cost Form) To ensure all offers are priced on a consistent basis, will the Agency publish the estimated or historical annual call volume, staffed hours, and voicemail counts for the Monday through Friday Member Services line, along with anticipated usage assumptions for the optional 24-hour pledge line?	PBS North Carolina is providing an approximate estimate of call volume, weekly and peak periods and current staffing for regular business hours.
RFP Section: 4.1 / Attachment D (Cost Form), 2.3, and 6.2.6	Attachment D requests an Hourly Call Rate. In addition to that hourly rate, may vendors present alternative or optional service models priced per talk minute on Attachment D, for example a shared agent pool option for the Member Services line or the optional 24-hour pledge line described in Section 2.3, or should such options be submitted as separately marked alternate offers per Section 6.2.6?	Yes.
RFP Section: 2.4 and 4.0 / Attachment D (Cost Form)	The contract term is one year with two two-year renewal options at the State's discretion. Please confirm that vendors should provide Year 2 through Year 5 recurring pricing assuming both renewal options are exercised, and clarify where Year 1 recurring operating rates should be presented on Attachment D.	Yes, please provide pricing for all possible renewal options.
RFP Section: 3.3.1 and 6.3.2.c and 6.3.2.d	Given that this solicitation seeks call agent staffing services rather than a software or system implementation for the State, please confirm the expected scope of the required Network Architecture and Technology Stack diagrams and the Security Vendor Readiness Assessment Report. Is the vendor's own hosted contact center environment the intended subject of these documents?	Please provide a technical overview of how your company manages agents and their devices, as required in the RFP. We do not need a Vendor Readiness Assessment Report or other diagrams. We do require a current PCI Attestation of Compliance under SAQ D for Service Providers.
RFP Section: 6.3.3	Section 6.3.3 instructs vendors to label the redacted copy "Volume Three Technical [and Cost] Proposal, Redacted Copy." Please confirm this labeling convention applies to this solicitation, as the RFP does not otherwise reference a volume structure.	N/A
3.4.1	What are the current and projected call volumes (by month, peak periods, and pledge events)?	Approx. 250 calls per week with 600-800 calls during pledge drives. Average handle time is 5-12 minutes. Peak periods at end of quarter and end of calendar year.

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3.4.1	What are the target service levels (e.g., ASA, abandonment rate, QA scores, donor satisfaction)?	PBS North Carolina requires calls to be answered within the first two minutes with voicemails being handled within 24 hours. 90% of calls should be answered with only 80% needing a secondary call or outreach.
3.4.1	What is the expected baseline staffing level vs. surge (pledge line or seasonal spikes)?	Minimum 2 operators with 1 supervisor
3.3.4	Are there existing telephony/CRM integrations, or is the vendor expected to provide the full CX platform?	Vendor is expected to provide.
3.4.1	Can PBS clarify the boundaries of PCI DSS responsibility (vendor vs. PBS vs. shared)?	Shared responsibility, as noted in the RFP, please include a shared responsibility matrix based on your company's technical and human components
3.4.1	What QA framework, scorecards, and compliance audit cadence are expected?	Annual SOCII or other certifications, annual PCI AOC (SAQ D for Service Providers)
3.4.1	What level of reporting granularity is expected (real-time dashboards vs. weekly reports vs. executive summaries)?	Weekly reports are expected, additional detail of what can be provided in these reports can be provided by the vendor in their response.
3.4.1	What is the expected onboarding timeline, knowledge transfer approach, and transition plan from current operations?	6 weeks
Attachment D	How will pricing be weighted relative to experience, security, and service quality in the final evaluation?	We will use best overall proposal meeting our requirements without specific weighting, as is allowed under NC General Statutes.
3.4.1	Please confirm where the payment/cardholder data will be hosted and will the vendor be responsible for storing, processing, transmitting, or accessing that data in any way?	Please see response for Question 42 above.
3.4.1	Will the vendor's agents handle card numbers directly through calls, recordings, tickets, transcripts, voicemails, or QA review?	Agents will handle cardholder data, including full PAN, CVV, etc., via telephony. Vendor is expected to take payment information via calls only with appropriate masking capability.
3.4.1	Does PBS have a call platform that the proposer's agents would be using? If not, please define the call flow as you see it occurring.	PBS North Carolina will be relying on the vendor's call platform for ongoing use with the expectation that the vendor will manage all needed security and compliance.
3.4.1	Please clarify that BlackBaud is the system of record. Is PBS currently using a BlackBaud payment process? If not, how are payments being processed today?	Blackbaud's Luminate Online and Raiser's Edge NXT are the SOR and are currently being used to process payments through Blackbaud Merchant Services.
3.3.6	If BlackBaud components are applicable to the system of record, why	Data migration not required

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	would a data migration be necessary? Wouldn't the potential bidder staff be given access to BlackBaud and continue work there?	
3.3.6	If a data migration is required, please provide the following: a) Database currently in use as well as desired product and version. b) For all transactional tables, the current row counts (total member row counts, including history, total payment records, etc.).	Data migration not required
3.2.2	In Section 3.2.2, none of the boxes are checked and FedRamp is mentioned. Is FedRamp infrastructure on components a vendor solution requirement? Please be specific on what should be on FedRamp and what may not be on FedRamp. Is the present solution architected in this way.	No
3.4.1	Please describe the anticipated training and ramp-up time for agents to use the components outlined in Section 3.4.1	6 weeks
3.4.1	Is PBS expecting the bidder to provide names of the contract center agents that will be assigned to this effort or just leadership (e.g., manager and up)?	Yes
Attachment D	Please confirm if the bidder should be providing unit costs (e.g., cost per hour per agent) or total yearly costs (e.g., hourly rate X # of hours per year). If the latter, can PBS please provide the expected number of billable hours to ensure an apples-to-apples comparison between bidders can be performed?	Unit costs
3.4.1	Is PBS open to bidders providing additional methods (e.g., chat and/or email) for donors to contact support?	Yes
3.4.1	Is PBS open to bidders providing AI-enabled technology (e.g., chatbots) to assist donors who would like to leverage such tools?	No
3.4.1	Will the vendor need to provide support in any language besides English? If yes, what is the expected percentage of interactions?	No
3.4.1	Who is currently performing the tasks outlined in the scope?	ACD Direct, Inc.

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3.4.1	Are offshore agents allowed to be assigned to this project?	Preference to North Carolina based agents
3.4.1	How long is agent training?	6 weeks
3.4.1	What percentage of calls should be recorded, and how long should the recordings be retained?	100% with payment information masked, 90 day retention required
	Is this a new contract or renewal of an existing contract?	New
	If there is an existing contract, could you please share the names of the current vendors and their pricing?	PBS North Carolina declines to answer this question.
	What is the estimated budget for this contract?	PBS North Carolina declines to answer this question.
	Is it mandatory to subcontract?	No
	Could you please provide information on the daily duration of shifts required for the necessary professions? For example, the number of hours per day?	PBS North Carolina expects regular business hour call operators to be available Monday-Friday from 9:00am-5:00pm.
	Can you provide additional detail on the expected headcount or scale of volume (e.g., number of calls per month, peak periods, or growth projections)?	Approx. 250 calls per week with 600-800 calls during pledge drives. Average handle time is 5-12 minutes. Peak periods at end of quarter and end of calendar year.
	Are there any "must-have" deliverables or outcomes beyond those stated in the RFP?	No
	Are there any critical milestones or go-live deadlines we need to consider, outside the 8/1/26 start date?	No
	What is the timeline for train the trainer?	6 weeks
	What is the Nesting and Training timeframe?	6 weeks
	Does the GovRAMP/FedRAMP cloud-product requirement (§3.2.2) apply to a staffing/managed-services vendor that operates inside PBS NC's own systems?	No
	Does the accessibility/VPAT requirement (§3.3.8) apply when the vendor provides agents, not a public-facing software product?	No
	Which party (PBS NC vs. vendor) provides telephony, call recording, and payment capture – to finalize	The vendor party is expected to provide telephony, call recording, masking of cardholder data taken during agent calls, and

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	PCI scope and the subcontractor inventory?	entry into our donor management system (which includes redirection to 3rd party payment processor)
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All other information contained in the RFP and Addendum 01 thereto remains the same.

INSTRUCTIONS:

1. Return one properly executed copy of this addendum **prior** to the Bid Opening Date/ Time listed above.
2. Please make the following change(s) in the bid referenced above:
3. Check **ONE** of the following options:

- ☐ Bid has **not** been submitted. **Any changes** resulting from this addendum are included in our bid.
- ☐ Bid has already been submitted. **No changes** resulted from this addendum.
- ☐ Bid has already been submitted. Changes resulting from this addendum are as follows.

Execute Addendum:

Bidder:_____

Authorized Signature:_____ **Date:**_____

Name and Title (Typed):_____