



**Request for Proposals 2026-008**

**Customer Information System Replacement  
Project**

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**ADDENDUM No. 1**

**ISSUE DATE: October 16, 2025**

Responding Offerors on this project are hereby notified that this Addendum shall be made a part of the above named RFP document.

The following items add to, modify, and/or clarify the RFP documents and shall have the full force and effect of the original Documents. This Addendum shall be acknowledged by the Offeror in the RFP document.

## Delete/Add/Replace Section

1. **Updated Date: The Shortlisted Vendor Notification will be the week of December 8, 2025.**

## Question/Answer Section

1. **Question:** There are a number of functional requirements for an online customer portal. However, the RFP also outlines an integration to the VertexOne Customer Portal. Is UCW looking for vendors to include their own integrated customer engagement platform in our pricing or should we be pricing an integration to the current VXEngage Portal?

**Answer** We would like to see both options (the cost to integrate with the existing system, but also if a portal is a component/add on of your product, what those costs, and the subsequent capabilities of this system).

Any implementation of a Customer Portal would be at a later phase, however having this information will allow us to plan for future opportunities and integrations.

2. **Question:** There are a number of functional requirements for a backflow application. However, there is also an integration to BSI Online. Is UCW looking for vendors to include their own integrated backflow program management software in our pricing or should we be pricing an integration to BSI Online? If you would like us to include pricing for our Backflow Solution, how many Testable Assemblies does the city currently manage?

**Answer:** We would like to see both options (the cost to integrate with BSI and your stand-alone product, what those costs, and the subsequent capabilities of this system). We are currently tracking approximately 5000 devices

3. **Question:** Will UCW consider moving to a new payment processor, or is there a preference in working with the existing processor (Paymentus)?

**Answer:** The County's current contract is with Paymentus, and it is anticipated that this relationship will continue. However, if a proposer's solution does not integrate with Paymentus or utilizes a different payment processor, the proposal should include associated costs and an implementation plan for the alternative processor.

4. **Question:** Can you clarify where UCW is in their AMI project and how many meters are AMI today?

**Answer:** We have about 63,000 meters total and around 61,000 have been converted to AMI.

5. **Question:** Most modern CIS solutions include a module for Mobile Field Service that is purpose built for short-cycle work, which we define as service orders generated out of the

CIS related to customer, meter or premise. This is typically industry best practice as opposed to using a Work Order/Asset Management application like Lucity, for short-cycle work. Is it safe to assume that the County would like for us to include Mobile Field Service for Service Orders in scope with the CIS solution? - To price Mobile Field Service for this bid, how many users do you require in each of the three following categories: A. Those requiring full edit access to orders such as field technicians and dispatchers; B. Those who would need read-only access to view reports or dashboards; C. Customer Service Representatives that might assist with scheduling orders for customers. Please note we can still include an integration to Lucity for customer-initiated work requests that are related to Assets if UCW prefers.

**Answer:** Yes, please provide a cost matrix for each user type A, B, C.

6. **Question:** If our platform has native capabilities to manage inbound and outbound communication by email, SMS and Voice as part of the CIS, will UCW consider that functionality to replace the Everbridge Notification System, or would you still like us to price an integration to Everbridge?

**Answer:** We would like to see both options; the cost to integrate with Everbridge and the cost to utilize your native product.

7. **Question:** Can you provide some more information on Matrix (IDE.14) – What kind of inventory is currently being managed in this platform? Will the Esri/GIS integration cover the integration needs here? Please note that industry best practice is that the CIS is the system of record as it relates to meter inventory.

**Answer:** The Matrix interface is a Desired requirement, and the County reserves the right to discuss during contract negotiations.

8. **Question:** Within the RFP, the County mentions it is currently utilizing VertexOne's customer portal and goes on to include a requirement for integration with this portal [page 12]. However, there seems to be a conflicting requirement for vendors to deploy their own portal as well. Can the County confirm it is looking to replace the VertexOne portal as part of this project, as opposed to simply integrating the new CIS with it?

**Answer:** See above answer to Question 1.

9. **Question:** Has the County received any proposals or interactive demonstrations for the kind of system described in the RFP following the deadline of the RFI for a similar solution back in 2023?

**Answer:** The County conducted informal vendor outreach demonstrations with Sprypoint, Univerus, Oracle, Tyler Technologies, Enquesta, Cusi in May 2025.

10. **Question:** Is the County leveraging a procurement consultant or advisory firm for this initiative?

**Answer:** Yes, UCW has retained BerryDunn as a consulting partner for this project. The role of BerryDunn is to provide information and analytical services to support this project.

BerryDunn will be facilitating activities as part of the procurement but will not be participating in the evaluation scoring. Evaluations and resulting decisions will be made solely by the UCW Evaluation Committee.

**11. Question:** For references it mentions: (References provided in Section 5.3.6 and past client experience described in Section 5.3.3 will be used to validate this information.). I can't find these sections in the RFP. Are they omitted or can you provide them?

**Answer:** Refer to Attachment A, Tab 11 for references.

**12. Question:** How many users are needed?

**Answer:** Refer to Table 05: Number of Users in the RFP Specifications document.

**13. Question:** How many years of data is to be converted?

**Answer:** Refer to Attachment B, Tab 10 Data Conversion for a complete list of Quantity of Data Needed in Future System.

**14. Question:** Are any attachments to be converted?

**Answer:** Attachments are not a requirement; however, the County reserves the right to discuss them further during contract negotiations.

**15. Question:** What vendors have you reviewed prior to the RFP?

**Answer:** See response to question #9.

**16. Question:** Is onsite training desired?

**Answer:** Onsite training would be preferred; however, the County is open to reviewing vendors' best practices.

**17. Question:** Can the County please provide the current number of backflow devices tracked?

**Answer:** . The current account file from BSI that contains 4,803 meters.

**18. Question:** In regards to the Data Migration component of the effort: Is there a total volume / record count / etc. that will need to be migrated from the old system(s)? I see reference to 60,000 active customers, but I'm assuming historical records will also need to be migrated. Any additional details you can provide around the total data migration effort would be greatly appreciated.

**Answer:** Refer to Attachment B, Tab 10 Data Conversion for a complete list of Quantity of Data Needed in Future System.

**19. Question:** Can you clarify which functional modules are mandatory vs. merely "nice-to-have" (e.g. service order management, prepay metering, advanced analytics)?

**Answer:** Refer to Attachment B, each Tab and requirements within those tabs has a Criticality assigned to each requirement.

**20. Question:** Are there existing contractual relationships or licensing constraints (e.g. with Harris NorthStar, Tyler Munis, Lucity, ESRI) that the solution must accommodate or replace?

**Answer:** UC Water currently maintains licensing with several enterprise systems, including Tyler Munis (ERP), Lucity (CMMS), and ESRI ArcGIS (enterprise GIS). These systems will remain in place and require integration with the selected CIS. There will be no long-term transitional coexistence with current CIS.

**21. Question:** Which systems must the CIS/UB system integrate with (ERP, GIS, AMI, CMMS, financial systems)?

**Answer:** Refer to Attachment B, Tab 11 Interfaces for all potential interfaces and their assigned Criticality.

**22. Question:** Will you provide a sandbox / test environment of the enterprise systems (Munis, GIS, etc.) for vendor integration efforts?

**Answer:** The County is open to vendors' best practices for integration implementation.

**23. Question:** Will the vendor be responsible for extracting and cleansing data from the legacy system (Harris NorthStar)?

**Answer:** The County is open to reviewing vendors' best practices and approach in Attachment A, Tab 7.

**24. Question:** What level and timing of training is expected (train-the-trainer, user training, refresher training)?

**Answer:** At a minimum, train-the trainer. However, we would like to see the cost of user training as well (if on site/virtual are both options, what the cost difference is between these as well).

**25. Question:** Is the procurement purely for software + services, or do you expect cloud / SaaS / subscription pricing models?

**Answer:** Please provide all of your solution offerings, refer to Section 4.4 of the RFP Specifications document.

**26. Question:** What is the expected budget range or funding constraints?

**Answer:** Refer to Section 4.9 of the RFP Specifications document.

**27. Question:** What security standards must the solution comply with (e.g. NIST, ISO, CPNI, state/county policies)?

**Answer:** The selected solution must comply with Union County's Information Security Policy and associated standards, which align with the NIST Cybersecurity Framework (CSF). Vendors are expected to adhere to industry-recognized security frameworks such as NIST 800-53 and/or ISO 27001.

Cloud-hosted solutions must demonstrate SOC 2 Type II compliance (or equivalent) and implement appropriate controls for protection of personally identifiable information (PII) and payment data (PCI-DSS where applicable).

Additional requirements may apply in accordance with Union County and State of North Carolina IT policies, including incident response, access control, and vulnerability management standards.

**28. Question:** What are the backup, disaster recovery, and business continuity expectations?

**Answer:** Please propose your DR and continuity strategies, refer to Attachment A, Tab 8 Table 8-02: Software Hosting Questions, question #17.

**29. Question:** What are the key risks the County anticipates (data loss, integration failures, schedule slippage)?

**Answer:** The County has identified data conversion and staff resources as a potential risk to the implementation. The County will look for the proposing vendors' best practices for mitigating those risks and other risks identified in Attachment A, Tab 3, question i.

**30. Question:** Are you open to changing your payment processor?

**Answer:** See answer to Question 3.

**31. Question:** Are you open to using a different customer portal?

**Answer:** See answer to Question 1.

**32. Question:** The project background notes that you currently use 'VXSmart' as a customer portal. Is the scope of this project to replace the existing portal with a new, fully integrated one, or to enhance the existing portal by building real-time integrations to it?

**Answer:** See answer to Question 1.

**33. Question:** The RFP mentions improving 'field service coordination.' Does the scope include a mobile workforce management (MWM) application for field crews, or is the expectation limited to the CIS generating service orders for the existing EAM system?

**Answer:** The expectation is limited to the CIS generating service orders for the existing EAM system at this time.

**34. Question:** Is Union County open to replacement of the meter data management (MDM) that reduces the integration and overall costs?

**Answer:** The County is open to reviewing what is available in the marketplace.

**35. Question:** Is the current field work system for customer related work the EAM?

**Answer:** Yes

**36. Question:** Could the County provide the applications required for connection? (referenced under GT.11: Other County-defined desktop productivity applications)

**Answer:** The County reserves the right to determine other desktop productivity applications at the time of implementation.

**38. Question:** Will you provide 12 months of statements for your payment processing?

**Answer:** The County cannot provide a response without additional information.

**39. Question:** Can you provide 12 months of transaction volumes for each payment channel (i.e. Web, IVR, In Person, mobile, kiosk, text-to-pay, etc.) and payment type for each (i.e. Credit Card, Debit Card, Digital Wallet, ACH, Cash, etc.)?

**Answer:** Yes – Paymentus Financial Summary Report Aug 2024 – Sept 2025

**40. Question:** Currently with your payment processor, are you passing processing fees on to customers as convenience fees or absorbing the processing fees?

**Answer:** We pass this fee on to our customers. Customers have the option to avoid these fees by signing up for automatic bank draft through our Fiscal department or by signing up for electronic check auto pay through Paymentus, our payment vendor.

**41. Question:** Can you provide your average transaction amounts?

**Answer:** Please see attachment for question 39

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*End of Addendum No. 1*