



Request for Proposal No. 2026-008

Customer Information System Replacement Project

Due Date: November 4, 2025
Time: 11:00 AM Local Time
Submittal Location: Electronic Submission
Union County Procurement and Contract
Management Department
*(Note: Follow the submittal instructions listed in this
document to electronically upload a proposal
package)*

Non-Mandatory Pre-Proposal Teleconference. September 18, 2025.

For the time and location, Refer to page 4 for details.

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Contents

1	Notice of Advertisement	4
2	Submittal Details	5
2.1	PROPOSAL SUBMISSION DEADLINE	5
2.2	PROPOSAL SUBMISSION REQUIREMENTS	5
2.3	PROPOSAL QUESTIONS	5
2.4	PROPOSAL ADDENDUM	6
2.5	COMMUNICATION	6
3	Introduction	6
3.1	COUNTY	6
3.2	RFP FRAMEWORK	6
3.3	PURPOSE	7
3.4	PROJECT BACKGROUND	7
3.5	PROJECT OBJECTIVES	8
3.6	DEFINITIONS	9
3.7	RFP SCHEDULE OF EVENTS	10
4	Scope of Work	11
4.1	FUNCTIONAL AREAS	12
4.2	ALTERNATE PROPOSALS, PARTNERSHIPS AND PROPOSERS OF SUBSETS OF FUNCTIONALITY	13
4.3	UCW AND PROJECT STAFFING	14
4.4	DEPLOYMENT MODEL	15
4.5	NUMBER OF USERS	16
4.6	POTENTIAL PHASING AND TARGET LIVE DATES	16
4.7	CURRENT APPLICATIONS ENVIRONMENT	16
4.8	PROJECT MANAGEMENT DOCUMENTATION	19
4.9	BUDGET	19
4.10	PERSONNEL	20
4.11	PERFORMANCE REVIEW	20
5	Detailed Submittal Requirements and Instructions	20
5.1	TERMS OF SUBMISSION	20
5.2	DUPLICATE PROPOSALS	21
5.3	PROPOSAL FORMAT	21
5.3.1	REQUIRED FORMS, WORKSHEETS AND OTHER ATTACHMENTS	22
6	Evaluation Criteria and Selection Process	22
6.1	SELECTION PARTICIPANTS	22
6.2	EVALUATION SELECTION PROCESS	23
6.3	AWARD PROCEDURE	25
7	General Conditions and Requirements	25
7.1	TERMS AND CONDITIONS	25
7.2	CONTRACTUAL OBLIGATIONS	26
7.3	SUB-OFFEROR/PARTNER DISCLOSURE	26
7.4	EXCEPTION TO THE RFP	26
7.5	MODIFICATION OR WITHDRAWAL OF PROPOSAL	26
7.6	EQUAL EMPLOYMENT OPPORTUNITY	27
7.7	MINORITY AND SMALL BUSINESS PARTICIPATION PLAN	27
7.8	LICENSES	27
7.9	E-VERIFY	27

7.10	DRUG-FREE WORKPLACE	27
7.11	INSURANCE	28
7.12	INDEMNIFICATION	30
7.13	OWNERSHIP OF DATA AND TRANSITION	30
7.14	DATA PRIVACY AND SECURITY	31
8	Appendix A – Cost PropOsal.....	32
9	Appendix B – Proposal Submission Form.....	33
10	Appendix C – Addendum and Anti-Collusion Form.....	34
11	appendix D – proposal response forms.....	35
12	appendix E – functional and technical requirements/Capabilities.....	36
13	Appendix F – Template Contract.....	37

1 NOTICE OF ADVERTISEMENT

Union County, North Carolina Request for Proposals No. 2026-008 Customer Information System Replacement Project

Electronic proposals will be received by the Union County's Procurement Department until **11:00 a.m., November 4, 2025**. The proposal must be submitted electronically, refer to section 2.2 for submittal instructions.

Union County, North Carolina, through Union County Water, is soliciting Proposals from Proposers capable of satisfying the needs for software and consulting services to implement a new software systems environment to address UCW's needs related to Utility Billing and Customer Information Systems (UB).

Copies of the solicitation may be obtained from the locations listed below:

1. Download the Solicitation Documents from the Union County website:
<https://www.unioncountync.gov/departments/bids-procurement/current-bids>
2. Download the Solicitation Documents from the State of North Carolina eVP website:
<https://evp.nc.gov/solicitations/> (Search County of Union)

A Non-Mandatory Pre-Proposal Teleconference: This is a non-mandatory meeting that will take place on **September 18, 2025, at 10:00 a.m.** Representatives from Union County Water will be on-hand to give a brief overview of the project and to answer questions. Attendance at this meeting is strongly encouraged. The Microsoft Teams Meeting link is listed below.

[RFP 2026-008 Pre-Submittal Meeting \(Microsoft Teams Link\)](#)

All questions about the meaning or intent of the RFP Documents are to be submitted in writing to the Procurement Representative listed on the cover page (corey.brooks@unioncountync.gov) no later than **October 2, 2025 at 5:00 p.m.**

Union County reserves the right to reject any or all proposals, to waive technicalities and to make such selection deemed in its best interest.

Union County reserves the right to award to multiple vendors.

Offerors are required to comply with the non-collusion requirements set forth in the Solicitation Documents.

Union County encourages good faith effort outreach to Minority Businesses (HUB Certified) and Small Businesses.

--End of Advertisement--

2 SUBMITTAL DETAILS

2.1 PROPOSAL SUBMISSION DEADLINE

All Proposals are to be received electronically by the Union County Procurement Department no later than **November 4, 2025, at 11:00 a.m. Local Time**, per the instructions below. Any proposals received after this date and time shall be rejected without exception.

2.2 PROPOSAL SUBMISSION REQUIREMENTS

The proposal must be submitted electronically using the following link: <https://lfportal.unioncountync.gov/Forms/procurementsubmit>. The proposal must be signed by a person who is authorized to bind the proposing Company. Instructions for preparing the proposal are provided herein.

Proposal Section	Recommended File Naming Convention	Required File Format
Technical Proposal (Inclusive of Attachments A and B any Exhibits/Attachments)	"(Proposer Name)" Technical Proposal	All files combined into one (1) searchable Adobe PDF
Attachment B – Functional and Technical Requirements	"(Proposer Name) Proposal Response to Attachment B"	To be submitted in Microsoft Excel format, in addition to above PDF format
Price Proposal (Inclusive of Attachments C1 and C2, Proposer's Standard Travel and Expense Policy, and any Appendices)	"(Proposer Name)" Price Proposal	All files combined into one (1) searchable Adobe PDF
Attachment C1 – Cost Worksheets	"(Proposer Name) Proposal Response to Attachment C1"	To be submitted in Microsoft Excel format, in addition to above PDF format

A delivery notification email, from LF-Forms@co.union.nc.us, will be sent as your confirmation of receipt. Please add this email address to your email contacts.

Paper submissions and/or email submissions will not be accepted.

There is no expressed or implied obligation for Union County to reimburse for any expenses incurred in preparing proposals in response to this request.

Union County reserves the right to reject any or all proposals, to waive technicalities and to make such selection deemed in its best interest, cancel this solicitation and award to multiple vendors.

2.3 PROPOSAL QUESTIONS

Proposal questions will be due on or before **October 2, 2025, at 5:00 p.m. Local Time**. The primary purpose of this is to provide participating vendors with the opportunity to ask questions, in writing, related to the RFP.

Submit questions by email to Corey Brooks at corey.brooks@unioncountync.gov by the deadline shown above. The email should identify the proposal number and title. All questions and answers may be posted as addenda on www.unioncountync.gov and <https://evp.nc.gov/solicitations/>.

2.4 PROPOSAL ADDENDUM

Union County may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum. Should an Offeror find discrepancies or omissions in this RFP, or any other documents provided by Union County, the Offeror should immediately notify the County of such potential discrepancy in writing via email as noted above.

Any addenda to these documents shall be issued in writing. No oral statements, explanations, or commitments by anyone shall be of effect unless incorporated in the written addenda. Receipt of Addenda shall be acknowledged by the Offeror on Appendix C, Addendum and Anti-Collusion Form.

2.5 COMMUNICATION

All communications, any modifications, clarifications, amendments, questions, responses or any other matters related to this Request for Proposals must be made only through the Procurement Contact noted on the cover of this RFP. A violation of this provision is cause for the County to reject a Company's proposal. No contact regarding this document with other County employees is permitted and may be grounds for disqualification.

3 INTRODUCTION

3.1 COUNTY

Union County, North Carolina, established in 1842, is located in the south-central portion of the state, adjacent to Charlotte/Mecklenburg County and bordering South Carolina. The County spans approximately 643 square miles and serves an estimated population of 263,386 residents. Union County provides a wide range of services, including public safety, water and wastewater utilities, sanitation, human services, cultural and recreational activities, and general government administration. Union County Water (UCW) is a department of Union County Government and operates as a self-supporting enterprise funded by water and wastewater rates and fees—not tax dollars.

3.2 RFP FRAMEWORK

Union County, through Union County Water (UCW), is soliciting proposals to modernize its Customer Information and Utility Billing (CIS/UB) environment. The County seeks a solution that strengthens interoperability with existing enterprise systems — including asset management, GIS, AMI, and ERP platforms — while delivering a modern CIS/UB application that improves operational efficiency, data accuracy, and customer service. The selected vendor will provide software and professional services including implementation,

configuration, data migration and conversion, integration development, training, documentation, and long-term support.

UCW's goal is to reduce reliance on manual and paper-based processes, enforce accurate and consistent data entry through robust validation, and deliver enhanced services to both customers and staff. A flexible, scalable system environment with real-time data access and integration capabilities is critical to long-term success.

3.3 PURPOSE

In addition to soliciting written responses, this RFP provides information to assist Proposers in preparing their submissions and supports the subsequent evaluation and review process. In that regard, this RFP:

- Provides information essential to soliciting meaningful recommendations and realistic commitments from Proposers
- Specifies the desired format and content of proposals in response to this RFP
- Outlines UCW's evaluation and selection procedures
- Establishes a schedule for the preparation and submission of proposals

This RFP and the selected Proposal will be incorporated into the resulting contract.

3.4 PROJECT BACKGROUND

Union County Water (UCW) provides water and wastewater services to approximately 58,061 water and 44,389 wastewater customers across residential, commercial, institutional, and agricultural accounts. Service demands continue to increase due to UCW's proximity to the City of Charlotte and broader regional growth trends. UCW delivers water service to most major urbanized areas of Union County, with the exception of the City of Monroe and Town of Marshville. Service areas include Indian Trail, Stallings, Waxhaw, Wingate, Weddington, Wesley Chapel, Fairview, Hemby Bridge, and large rural portions of unincorporated Union County. Water is sourced from the Catawba River Water Treatment Plant and the Yadkin River Water Treatment Plant.

The County's wastewater system is supported by five water reclamation facilities ranging in size from 0.05 MGD to 7.5 MGD, with a combined treatment capacity of 9.65 MGD. UCW also maintains contracted wastewater treatment capacity with the City of Monroe (2.65 MGD) and Charlotte-Mecklenburg Utilities (3.0 MGD). This infrastructure supports a growing service area with increasingly complex customer and operational needs.

UCW has invested in a unified technology strategy that emphasizes real-time data collection, visualization, and interoperability to support and inform decision-making. Recent innovations include the deployment of Advanced Metering Infrastructure (AMI), Internet of Things (IoT) sensors, and advanced Extract-Transform-Load (ETL) tools that integrate geospatial data

with enterprise systems for spatial analysis. These efforts reflect UCW's long-term commitment to leveraging technology for asset management, operational efficiency, and enhanced customer service.

UCW's current Customer Information System and Utility Billing (CIS/UB) environment is an on-premise installation of Harris NorthStar, implemented nearly two decades ago. While the system continues to process billing and maintain core account data, its design reflects an earlier era of utility operations and has not evolved to match UCW's growth, service complexity, or modern customer expectations. Many essential processes — including service orders, billing adjustments, account updates, and reporting — require manual workarounds, spreadsheet tracking, or re-keying of data between systems.

UCW also operates enterprise asset management (EAM), ESRI (GIS), VXSmart (customer portal), AMI (Sensus), and Tyler Munis (financials/HR). Integrations between these platforms and the CIS are limited, often relying on periodic batch updates rather than real-time synchronization. This fragmentation results in siloed datasets, inconsistent records, and delays in both field service coordination and customer communication.

Looking ahead, UCW seeks to modernize its CIS/UB environment to align with its broader digital transformation strategy. Customers increasingly expect real-time account visibility, self-service portals, mobile access, and proactive notifications. Internally, UCW processes tens of thousands of bills, payments, and service orders annually, and requires a system that can scale to support continued growth while reducing the operational burden of manual interventions.

The County's long-term technology vision prioritizes modular, standards-based interoperability across platforms — ensuring that CIS/UB modernization strengthens, rather than duplicates, UCW's broader investments in GIS, asset management, AMI, and financial systems. Solutions must support open, well-documented integration methods (e.g., APIs, web services, or equivalent) and be adaptable to future innovations, including artificial intelligence, advanced analytics, and other emerging technologies.

3.5 PROJECT OBJECTIVES

The overall goal of this project is to leverage modern technology to enhance efficiency, streamline operations, and improve service delivery by modernizing core software systems that support Union County operations. Union County Water plans to replace its current software environment with a modern solution or suite of systems designed to support and optimize essential business processes.

In doing so, the County aims to address current challenges and achieve long-term efficiencies, including but not limited to:

Key Objectives and Outcomes:

- Improve operational effectiveness through a customer-facing online portal that provides timely, accurate, and complete information to both customers and Union County personnel.
- Improve operational effectiveness through an intuitive, user-friendly CIS solution that streamlines and automates internal processes for more efficient task handling and information sharing.
- Strengthen real-time integration between key operational systems and authoritative data sources — such as asset management, GIS, and AMI platforms — to ensure a single source of truth, reduce manual data handling, and eliminate siloed datasets.
- Implement robust data validation capabilities to support a single source of truth for all data related to Customer Information, minimize user error, and improve confidence in system data.
- Enhance workflows through process automation and configuration to improve operational efficiency and responsiveness.
- Increase staff productivity by eliminating redundant, manual, or paper-based tasks.

Primary Challenges in the Current Environment:

- Heavy reliance on spreadsheets, manual data entry, and paper-based workflows for processes such as billing adjustments, service applications, and payment tracking.
- Lack of data standardization and system-enforced validation rules, resulting in inconsistent records for customer names, addresses, and meter IDs.
- Limited reporting functionality that either lacks robustness or requires advanced proficiency in Cognos.
- Absence of real-time communications related to outages, billing inquiries, and service orders, contributing to reduced customer satisfaction.

To address these and other operational limitations, Union County has initiated this project to plan, procure, and implement a modernized CIS/UB solution. **Section 4.0 – Project Scope** describes the key features, functional requirements, and professional services necessary to successfully implement the desired system.

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3.6 DEFINITIONS

ADDENDA – Written instruments issued by Union County prior to the deadline for receipt of Proposals that modify or interpret the RFP documents by additions, deletions, clarifications, or corrections.

CONTRACT DOCUMENTS – The RFP, the submitted Proposal, including any diagrams, Addenda, and the executed agreement between Union County and the selected Contractor, including all change orders, insurance certificates, exhibits, amendments, and attachments.

CONTRACTOR – The individual(s), firm(s), or consultant(s) awarded a contract to provide the software solution and professional services to implement the Utility Billing (UB) and Customer Information System (CIS) for Union County.

DAYS – Calendar days, unless otherwise specified.

PROJECT – The project to plan, procure, configure, and implement a Utility Billing and Customer Information System (CIS/UB) for Union County as described in this RFP and its attachments.

PROJECT SCOPE – The scope of goods and services to be provided by the selected Contractor as described in this RFP and referenced attachments.

PROPOSAL – A complete and properly executed response submitted in accordance with this RFP to provide software, services, or other specified deliverables.

PROPOSER – Any individual, company, corporation, partnership, or other legal entity submitting a Proposal in response to this RFP.

SERVICES or WORK – All software, implementation, integration, training, support, and related services to be provided by the Contractor to fulfill the requirements of the Project.

SUBCONTRACTOR or SUBCONSULTANT – Any person or entity that contracts with a Contractor or another Subcontractor to perform part of the services required under the resulting Contract.

UNION COUNTY – Refers to Union County, North Carolina, including its Utility division responsible for water and wastewater services.

EVALUATION COMMITTEE – The team of Union County staff assigned to review, evaluate, and score Proposals and conduct any follow-up steps such as interviews or demonstrations.

PROJECT MANAGER – The Union County representative assigned to manage and oversee all aspects of the project and serve as the County's primary point of contact for the selected Contractor.

UTILITY BILLING (UB) – Refers to the utility billing and customer information system to be provided under this RFP, including all software and functionality described in this document and its attachments.

3.7 RFP SCHEDULE OF EVENTS

The following RFP Schedule of Events represents the best estimate of the schedule UCW will follow, which is subject to change at UCW's discretion. Vendors are encouraged to hold the demonstration dates listed. If a component of the schedule is accelerated or delayed, it shall be anticipated that the remaining components may also be adjusted by a similar number of days via RFP Addendum prior to the submittal deadline.

Table 02: RFP Schedule of Events

Event	Estimated Date
RFP Published	September 3, 2025
Pre-Proposal Vendor Teleconference	September 18, 2025, at 10:00 a.m. ET
Deadline for Questions from Vendors	October 2, 2025, at 5:00 p.m. ET
Deadline for Proposal Submissions	November 4, 2025, at 11:00 a.m. ET
Shortlist Vendors Notified	<i>Week of November 8, 2025</i>
Vendor Demonstrations	<i>Week of January 5, 2026</i>

4 SCOPE OF WORK

Union County is seeking a qualified vendor to provide a comprehensive, modern Customer Information System (CIS) and Utility Billing (UB) solution that supports the full lifecycle of customer service, billing, and service order management. The County expects a system that delivers the full suite of core CIS/UB modules—functionally unified and designed to work seamlessly as one solution—while maintaining interoperability with Union County’s existing enterprise applications.

The selected vendor will be expected to provide software, implementation services, data migration, training, documentation, system configuration, testing, and long-term maintenance and support in alignment with Union County’s technology strategy. Solutions should emphasize interoperability, flexibility, and scalability, ensuring the ability to adapt to future needs such as advanced analytics, artificial intelligence (AI), and evolving business and integration standards for APIs, web services, or equivalent.

The County’s objective is to procure a CIS/UB environment that is comprehensive in its own domain yet modular and standards-based, ensuring smooth integration with UCW’s broader technology ecosystem (including ERP, Finance, GIS, WMMS, and AMI systems).

Union County welcomes vendors to highlight optional or extended capabilities of their solution beyond the core CIS/UB requirements. While the County is not seeking to replace existing enterprise systems (ERP, GIS, EAM, AMI), proposers may describe additional functionality as ‘optional’ features that could be considered for future adoption or to complement current platforms. Such information should be clearly separated from the required CIS/UB scope.

A complete and detailed description of the functional and technical requirements, as well as implementation expectations, is provided in **Attachment B – Project Scope and Functional Requirements**, located in **Section 12 – Appendix E** of this RFP. This includes, but is not limited to:

- Customer Account Management

- Billing and Payment Processing
- Service Order and Request Management (for customer-related work, not duplicating UCW's Enterprise Asset Management system)
- Online Customer Portal
- Integration with systems such as **Tyler Munis (ERP/HR), Lucity (CMMS/EAM), ESRI (GIS), and VXSmart (AMI/Portal)**
- Data migration from legacy CIS (Harris NorthStar)
- Implementation project plan and phased rollout strategy
- Training, testing, and support
- Security and compliance standards

Proposers must thoroughly review **Attachment B – Project Scope and Functional Requirements** and ensure their proposal clearly demonstrates how their solution satisfies all identified requirements and deliverables.

4.1 FUNCTIONAL AREAS

The following table contains the list of functional areas of the desired future systems environment.

Table 03: Functional Areas

Functional Areas			
No.	Functional Area	No.	Functional Area
1	Account and Customer Management	5	Service Orders and Inventory
2	Rates and Calculation	6	Online Portal
3	Billing	7	Reporting
4	Collections Management	8	Forms

The List of Functional and Technical Requirements/Capabilities contained in **Attachment B – Functional and Technical Requirements/Capabilities** contains the detailed functionality UCW requires within each functional area in a future systems environment, as well as general and technical system requirements, and data conversion and interface scope.

The following table contains functional statistics of UCW. These statistics are estimates and are provided for planning purposes only.

Table 04: Functional Area Statistics

Functional Area/Metric	Statistic
Number of Customer Accounts	Water: 58,061 Wastewater/sewer:44,389
Services Offered	Water, Wastewater, Bulk Hydrant
Number of Billing Cycles/Reads	Water: 10 Wastewater/sewer:10 Ad-Hoc: 4 - Bulk Hydrant, Sewer-Only (Key Accounts), Miscellaneous Billing, Sewer-Only (Flat-Rate & Metered)
Frequency of Billing Cycles/Reads	Monthly
Bill Printing	~58,350 monthly
Number of Work Orders Annually (2024 Data)	137,107 Logged Calls 51,526 Completed Work Orders
Useful Links	
<ul style="list-style-type: none"> • County FY2024 – 2025 Adopted Budget: https://www.unioncountync.gov/home/showpublisheddocument/9728/638772816225730000 • County Quarterly Capital Improvement Project Report: https://www.unioncountync.gov/government/departments-f-p/quarterly-capital-reports • UCW: https://www.unioncountywater.org/home • UCW Rate and Fee Schedule: https://www.unioncountywater.org/home/showpublisheddocument/9430/638653285455200000 	

4.2 ALTERNATE PROPOSALS, PARTNERSHIPS AND PROPOSERS OF SUBSETS OF FUNCTIONALITY

Alternate Proposals:

- UCW will not be accepting alternate Proposals for evaluation.
- Software companies that deliver their solution through one or more consulting firms (system integrators) are also allowed to submit more than one Proposal for consideration through differing consulting firms.

- A separate Proposal package submitted in accordance with Section 4 is required in order for UCW to accurately evaluate each Proposal independent of the other.

Partnerships:

- Proposers are encouraged to establish partnership relationships to fully provide all requirements defined by the RFP.
- Proposers engaged in a partnership relationship shall submit a single proposal in response to this RFP.
- Partnership relationships shall be clearly defined by proposal responses. Such definition shall identify the entity in the partnership relationship deemed to be the Prime Vendor.
- Each Vendor engaged in the partnership shall respond to any and all applicable portions of this RFP that relate to the work that will be performed, or the capabilities provided. For example, each Vendor shall provide references, and each Vendor shall respond to the Company Background and History questions.

Proposers of Subsets of Functionality:

- As part of this process UCW will not be allowing Proposers to submit point solutions (best of breed).

4.3 UCW AND PROJECT STAFFING

UCW intends to have functional and technical resources available during Project implementation, though it is noted that UCW does not anticipate dedicating staff full-time to the implementation in addition to managing their core job responsibilities. This applies to both functional resources as well as technical resources internal to UCW. It is anticipated that some functional leads will serve as the functional lead, or a subject matter expert, across one or more modules – particularly within the financial modules of a future system – during the implementation process.

Staffing is a key factor for UCW, both during the implementation phase and in maintaining support once the software is operational. Vendors are encouraged to submit questions to UCW during the RFP questions period to solicit such additional information as is necessary to adequately estimate the resource commitments that would be expected of UCW during implementation, and post go-live for ongoing support of the system(s). Additional resource planning will be performed based upon the selected Proposer(s).

Proposers shall clearly indicate in the proposal responses the estimated level of UCW resource involvement in the implementation process, in order to allow UCW to perform adequate planning. UCW will utilize the response to Proposers' Resource Hour Estimates in **Attachment A, Tab 3**, of Proposals as an input into the staffing plan UCW develops, and

requests that Proposers clearly articulate estimated staffing considerations in their responses.

4.4 DEPLOYMENT MODEL

UCW is open to considering various deployment models, and has structured the RFP to allow for the evaluation of the deployment model as but one factor in the overall procurement process. UCW wishes to evaluate the greatest range of marketplace offerings feasible through this process.

UCW recognizes there are many factors contributing to a comparison of cost Proposals for these various deployment methods including needed infrastructure and/or hardware costs, the potential for reduced hardware and support costs in hosted/SaaS models, a particular Proposer's approach to managing upgrades, and technical staffing needs. UCW has a preference toward a Software as a Service (SaaS) deployment model but also recognizes that the scope of this opportunity may result in the award to two or more vendors to address all functionality and UCW wishes to evaluate the greatest range of available solutions in the market including those that may be locally hosted by UCW. As such, UCW is open to considering all deployment models in light of the breadth of functionality and available solutions in the marketplace to address those functional areas. UCW will consider, in no particular order, the following deployment models:

- a. On Premise (locally hosted at UCW, perpetual licenses)
- b. Proposer hosted (hosted and managed by the Proposer, perpetual licenses)
- c. Software as a Service (SaaS or subscription-based models)

Cost sheets have been provided under **Attachment C1 – Cost Worksheets** for pricing each of the deployment models.

This solicitation is not a bid process nor will it follow a lowest-priced responsive Proposal process, but will be based on most advantageous Proposal(s) utilizing the Evaluation Criteria listed in the RFP, including the review of life cycle costs (i.e., recurring costs, hardware, third-party licenses, etc.).

In developing proposals, Proposer's shall clearly define the proposed deployment model including the licensing model as well as any perceived benefits of the proposed model. In the event two or more products are proposed under the same proposal (e.g., through a partnership or offered by the same company) the Proposer shall clearly indicate in both the technical proposal (**Attachment A, Tab 2**) and cost proposal (**Attachment C1**) the deployment model for each proposed software product.

UCW does not have a preference as to a specific hosting location but does have a requirement toward the hosting being within the contiguous United States. Vendors are requested to specify the hosting location in proposal responses, specifically as part of

Attachment A, Tab 8 to proposal responses (please see **Attachment A** for further instruction).

4.5 NUMBER OF USERS

The following user counts by role contained in the table below are estimates and are provided for planning purposes only. The number of users represents the **current County staff resources**.

Table 05: Number of Users

County Role	Number of Users
Customer Care	18
AMI Services	7 (1 Superintendent, 2 Supervisors, 3 dispatchers, and 1 AMI Service Technician that should have the same permissions as Customer Care as far as reviewing accounts, the ability to place work orders, view usage, etc.)

4.6 POTENTIAL PHASING AND TARGET LIVE DATES

UCW requests that offerors provide potential phase start and target go-live dates in proposal responses per Attachment A, Tab 5. These dates should be estimates based on anticipated resource requirements and dependencies between functional areas. These dates are subject to negotiation. UCW anticipates that implementation activities would begin in calendar Q2 2026. UCW follows a July 1 – June 30 fiscal year.

4.7 CURRENT APPLICATIONS ENVIRONMENT

UCW's current utility software solution (Harris NorthStar v6.6) was implemented approximately 20 years ago; it stores and manages approximately 60,000 active customer accounts. It is an on-prem solution using a SQL database. The system also uses a Cognos reporting tool. UCW's customer-facing environment includes a third-party customer portal (VertexOne) that provides online account access, integrated with Paymentus for secure payment collection and OSG for both print and digital bill delivery. UCW is also currently implementing AMI (Sensus) for meter reading to replace its legacy AMR program. A separate Work and Maintenance Management System (CS EAM) handles service requests (integrated with current CIS) and work order management.

Table 06: Current UB Functions

Current UB Functions			
1	Account and Customer Management	5	Service Orders and Inventory
2	Rates and Calculation	6	Online Portal
3	Billing	7	Reporting
4	Collections Management	8	Forms

Other Major Applications

UCW also uses a wide variety of applications to provide capability and functionality in specialized areas. Many of these applications are listed in Table 07. **Identification of any potential future system interfaces is provided in Attachment B to this RFP.**

Table 07: Additional Software Applications

Additional Software Applications		
No.	Application	Use/Summary
1	Itron	Manual meter reading system
2	BSI Online	Customer backflow prevention management system
3	Cognos	Reporting tool
4	CS EAM	Asset management and work order system
5	Easylink	AMI Sensus field tool
6	ESRI	GIS

Additional Software Applications		
No.	Application	Use/Summary
7	Everbridge	Automated telephony notification system
8	Evolve	Building and planning codes
9	FileZilla	File Transfer Protocol (FTP) application
10	Global Protect VPN	Security
11	iPECS Report Plus (this will be changing to Ring Central)	Reporting tool
12	Laserfiche	Document management
13	Microsoft Office Suite	Excel, Outlook, OneNote, PowerPoint, Word, Teams. SharePoint
14	Munis	Enterprise Resource Planning (ERP) System
15	EverView f/k/a OSG	Bill print vendor
16	Paymentus	Online Bill Pay, Interactive Voice Response (IVR)
17	PowerBI	Reports/Analysis
18	RNI	Advanced Metering Infrastructure (AMI) Sensus HES
19	RSI Collections	Third-party debt collections services
20	Safe Software	ETL Tool
21	Sensus Analytics	AMI Meter Data Management System (MDMS)
22	Slack	Collaboration and Communication
23	SSMS	Microsoft Relational Database Management System (RDBMS)
24	Utility Online Exchange	Customer credit checks
25	VXEngage	VertexOne Customer Portal

4.8 PROJECT MANAGEMENT DOCUMENTATION

The following information establishes the expectation of the minimum level of project management documentation to be provided by Proposers as a part of, but not exclusively, the resulting implementation services offered. As part of the implementation scope, following signing of a contract, the selected Contractor(s) shall develop and provide UCW with the following items:

- Project Management Plan: a detailed Implementation Project Plan that, at a minimum, includes the following:
 - Objectives
 - Deliverables and Milestones
 - Project Schedule
 - Resource Management Processes
 - Scope Management Processes
 - Schedule Management Processes
 - Risk Management Processes
 - Quality Management Approach
 - Communication Management Approach
 - Organizational Change Management Approach
 - Status Reporting
- Data Conversion Plan
- Training Plan
- System Interface Plan
- Testing and Quality Assurance Plan
- Pre- and Post-Implementation Support Plan
- System Documentation
- Risk Register

Additional documentation about each Plan may be found in Attachment A, Tab 3, attached to this RFP.

4.9 BUDGET

UCW is committed to funding the one-time and recurring annual costs for the acquisition of the software. UCW has established a budget for this project informed in part by the recent Request for Information process, but also intends to use the proposals received through this process to inform the budget development process. UCW has performed initial, high-level

estimations, for the cloud-based software solution including professional services and recurring maintenance/subscription costs. Recognizing the likelihood of multiple awards as a result of this RFP, a final budget will be programmed based on the results of this RFP and final contract negotiations.

UCW is sensitive to the total costs, and has listed cost as one of the several evaluation criteria in the RFP; however, this is not an opportunity to identify the lowest priced solution. This RFP opportunity is being presented as a best value solicitation, and not a lowest priced bid, opportunity.

4.10 PERSONNEL

All of Contractor's personnel providing goods and services under the contract shall possess the necessary skills, experience, and knowledge, to perform their assigned duties. In the event assigned personnel are providing non-conforming or unsuitable services, UCW shall notify Contractor and provide the opportunity to rectify the deficiency. If unable to cure the nonconforming services, Contractor shall remove from the project and replace the Contractor's personnel that UCW deems unsuitable for the project with a resource possessing the necessary skills, experience, and knowledge, to perform their assigned duties in a satisfactory manner.

4.11 PERFORMANCE REVIEW

The Contractor may be required to meet with UCW's Project Manager not less than once per quarter to conduct a performance review of the Contractor. These meetings will be either in person at UCW offices, or via teleconference or web-conference. This performance review will include a review of the pricing, delivery performance, customer service, and improving operational efficiencies.

5 DETAILED SUBMITTAL REQUIREMENTS AND INSTRUCTIONS

5.1 TERMS OF SUBMISSION

All material received from a person or company ("Offeror") in response to this solicitation shall become the property of Union County and will not be returned to the Offeror. Any and all costs incurred by an Offeror in preparing, submitting, or presenting submissions are the Offeror's sole responsibility and Union County shall not reimburse the Offeror. All responses to this solicitation will be considered a public record and subject to disclosure under applicable public records law.

Any material in a response which the Offeror considers a trade secret and exempt from disclosure as a public record under applicable law, including N.C.G.S. §§ 132-1.2 and 66-152, must be properly designated as a trade secret. In order to properly designate such material, the Offeror must: (i) submit any trade secret materials in a separate envelope, or file, from all other submitted material, being clearly marked as "Trade Secret – Confidential and Proprietary Information," and (ii) stamp the same trade secret/confidentiality designation on each page of the materials therein which contain trade secrets.

To the extent consistent with public records law, Union County will make reasonable efforts to maintain the confidential nature of trade secrets, as determined by Union County and subject to the conditions set forth herein. Offeror understands and agrees by submitting a response to this solicitation, that if a request is made to review or produce a copy of any information in the Offeror's materials which was properly labeled by the Offeror as a trade secret, Union County will notify the Offeror of the request and the date that such materials will be released to the requestor unless the Offeror obtains a court order enjoining that disclosure. If the Offeror fails to obtain the court order enjoining disclosure prior to that date, Offeror understands and agrees that Union County will release the requested information to the requestor on that date.

Furthermore, the Offeror also agrees to indemnify and hold harmless Union County and each of its officers, employees, and agents from all costs, damages, and expenses incurred in connection with refusing to disclose any material that has been designated as a trade secret by Offeror.

5.2 DUPLICATE PROPOSALS

No more than one (1) proposal from any Offeror will be considered by the County. In the event multiple proposals are submitted in violation of this provision, the County will have the right to determine which proposal will be considered, or at its sole option, reject all such multiple proposals.

5.3 PROPOSAL FORMAT

The County desires all responses to be identical in format. While the County's format may represent a departure from the Offeror's preference, the County requests adherence to the format. All responses are to be in the format described below.

Offerors should prepare their proposals in accordance with the instructions outlined in this section. Each Offeror is required to submit the proposal electronically – Refer to Section 2.2. Each section should be identified as described below. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the RFP.

The successful Offeror's proposal must include all responses to the requirements contained within this RFP and all appendices (if applicable) must be completed in their entirety.

The utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, or tables should be numbered and clearly labeled. Response information should be limited to pertinent information only. Marketing and sales type information is not to be included.

The RFP should include a response to each of the following criteria. **Failure to address each area could result in rejection of a proposal.** Please provide a table of contents in the

format of the proposal requirements along with tabs identifying each section and subsection. Include examples of procedures, reports, or other information where applicable.

The proposal should be organized and identified by the Tab's listed in Appendix D Proposal Response Forms "Attachment A – Proposal Forms". Submit the requested information for all Tabs and Supplements as described in this attachment.

Omissions and incomplete answers may be deemed unresponsive.

5.3.1 REQUIRED FORMS, WORKSHEETS AND OTHER ATTACHMENTS

Offerors must include completed copies of the following documents:

1. Appendix A – Cost Proposal (Attachment C2; completed); submit with proposal
 - Attachment C1 – Cost Worksheets
(See MS Excel spreadsheet "Union County UB RFP – Attachment C1.xlsx")
 - Attachment C2 – Cost Narrative
(See MS Word document "Union County UB RFP – Attachment C2.docx")
2. Appendix B – Proposal Submission Form (signed)
3. Appendix C – Addenda Receipt and Anti-Collusion (signed)
4. Appendix D – Proposal Response Forms
 - Attachment A – Proposal Response Forms
(See MS Word document "Union County UB RFP – Attachment A.docx")
5. Appendix E – Attachment B: Functional Requirements Matrix (completed)
(See MS Excel spreadsheet "Union County UB RFP – Attachment B.xlsx")

6 EVALUATION CRITERIA AND SELECTION PROCESS

6.1 SELECTION PARTICIPANTS

Maintaining the integrity of the RFP process is of paramount importance for the County. To this end, please do not contact any members of Union County or its staff regarding the subject matter of this RFP until a selection has been made, other than the County's designated contact person identified in the introduction to this RFP.

Representatives of Union County will read, review, and evaluate the RFP independently based on the evaluation criteria. Union County reserves the right to conduct interviews with a shortlist of selected Offerors. Failure to abide by this requirement shall be grounds for disqualification from this selection process.

The Owner will establish an RFP Evaluation Team to review and evaluate the RFPs. The RFP Evaluation Team will evaluate the RFPs independently in accordance with the published

evaluation criteria. Union County reserves the right to conduct interviews with a shortlist of selected Offerors.

At its sole discretion, the Owner may ask written questions of Offerors, seek written clarification, and conduct discussions with Offerors on the RFPs.

The County reserves the right to determine the suitability of proposals on the basis of a proposal meeting scope and submittal criteria listed in the RFP. Evaluation criteria and other relevant RFP information will be used to assist in determining the finalist Vendor.

6.2 EVALUATION SELECTION PROCESS

A weighted analysis of the evaluation criteria will be utilized to determine the Vendor that represents the best value solution for the County.

In the evaluation and scoring/ranking of Offerors, the Owner will consider the information submitted in the RFP as well as the meetings (if applicable) with the respect to the evaluation criteria set forth in the RFP.

The initial evaluation criteria/factors and relative weights listed below will be used to recommend selection of the Proposed Offeror or for the purpose of selecting Short-Listed Offerors. The County may choose to award without engaging in interview discussions.

RFP Criteria	Weights
<p>Project Approach/Implementation & System Requirements</p> <p><i>Evaluation of the Offeror's understanding of Union County's needs and the quality of the proposed implementation strategy. This includes the proposed methodology, approach to data conversion, training, risk mitigation, communication, and system hosting. Completeness and responsiveness to Attachment B – System Requirements will also be evaluated to ensure technical fit and the ability to meet Union County's business process needs.</i></p>	40%
<p>Key Personnel & Staffing</p> <p><i>Qualifications and experience of the proposed team members, including project managers and technical leads. Union County will evaluate the team's relevant experience with similar projects, their availability to support the County, and their knowledge of the local and regional environment. This aligns with Section 5.3.2 (Project Team).</i></p>	15%
<p>Company Experience</p> <p><i>Assessment of the Offeror's overall qualifications and track record with similar CIS and UB software implementations. This includes the firm's past performance on projects of similar size and complexity, quality of work, and ability to deliver on time and within</i></p>	20%

<p><i>budget. 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></p>	
<p>Reputation of Offeror</p> <p><i>Consideration of the Offeror’s history of professional conduct, including any legal or technical claims, disputes, or unresolved issues in past engagements. Union County will evaluate the Offeror’s ability to maintain positive client relationships and complete projects without major issues, as detailed in Section 5.3.5.</i></p>	<p>10%</p>
<p>Cost Proposal</p> <p><i>Evaluation of the proposed pricing, submitted in Attachment C2 and included as Appendix A. This includes the clarity and completeness of cost categories, transparency of any optional services, and overall value offered to Union County in comparison with the technical and service quality proposed.</i></p>	<p>15%</p>

After identification of Short-Listed Offerors, the Owner may or may not decide to invite Short-Listed firms to demonstrate. If demonstrations are scheduled with the Short-Listed Offerors, previous evaluation and rankings are not carried forward. For the purpose of selecting a Preferred Offeror, the evaluation criteria will be given the following relative weights:

Interview Criteria	Weights
<p>System Demonstration & Functionality</p> <p><i>Clarity and completeness of demonstration; ability of the proposed solution to meet Union County’s business and technical requirements, including scenario-based responses.</i></p>	<p>30%</p>
<p>Implementation Strategy</p> <p><i>Proposed approach to implementation, including timeline, change management, risk mitigation, and support during go-live and stabilization.</i></p>	<p>20%</p>
<p>System Usability & Configurability</p> <p><i>Ease of use, system navigation, configurability by non-technical users, and adaptability to evolving County needs.</i></p>	<p>20%</p>
<p>Understanding of Union County’s Needs</p> <p><i>Demonstrated understanding of the County’s environment, challenges, and desired outcomes.</i></p>	<p>10%</p>

<p>References & Prior Experience <i>Success with similar government utility clients; client satisfaction and results from past implementations.</i></p>	10%
<p>Cost Proposal <i>Overall value to Union County, including transparency, completeness, and competitiveness of pricing submitted in Attachment C2.</i></p>	10%

Additional meetings may be held to clarify issues or to address comments, as deemed appropriate. Proposers will be notified in advance of the time and format of such meetings.

6.3 AWARD PROCEDURE

The County reserves the right to make an award without further discussion of the proposals received. Therefore, it is important that the proposal be submitted initially on the most favorable terms. It is understood that any proposal submitted will become part of the public record.

The County reserves the right to award to multiple vendors.

Union County (UC) reserves the right to reject any or all proposals, to waive technicalities and to make such selection deemed in its best interest.

A proposal may be rejected if it is incomplete. Union County may reject any or all proposals and may waive any immaterial deviation in a proposal.

The County may accept that proposal that best serves its needs, as determined by County officials in their sole discretion.

More than one proposal from an individual, firm, partnership, corporation or association under the same or different names, will not be considered.

County may select and enter into negotiations with the next most advantageous Offeror if negotiations with the initially chosen Offeror are not successful.

The award document will be a Contract incorporating, by reference, all the requirements, terms and conditions of the solicitation and the Offeror’s proposal as negotiated.

7 GENERAL CONDITIONS AND REQUIREMENTS

7.1 TERMS AND CONDITIONS

The contract award may have an initial term of ten (10) years with two (2) one-year renewal options at the County’s discretion, pending annual budget approval.

By mutual agreement, any contract which may be awarded pursuant to this RFP, may be renewed in accordance with the description above at agreed prices with all other terms and conditions remaining the same.

All payroll taxes, liability and worker's compensation are the sole responsibility of the Offeror. The Offeror understands that an employer/employee relationship does not exist under this contract.

All proposals submitted in response to this request shall become the property of Union County and as such, may be subject to public review.

Union County has the right to reject any or all proposals, to engage in further negotiations with any Company submitting a proposal, and/or to request additional information or clarification. The County is not obligated to accept the lowest cost proposal. The County may accept that proposal that best serves its needs, as determined by County officials in their sole discretion.

7.2 CONTRACTUAL OBLIGATIONS

The contents of this Proposal and the commitments set forth in the Proposal shall be considered contractual obligations if a contract ensues. Failure to accept these obligations may result in cancellation of the award. All legally required terms and conditions shall be incorporated into final contract agreements with the selected Service.

7.3 SUB-OFFEROR/PARTNER DISCLOSURE

A single Company may propose the entire solution. If the proposal by any Company requires the use of sub-consultants, partners, and/or third-party products or services, this must be clearly stated in the proposal. The Company submitting the proposal shall remain solely responsible for the performance of all work, including work that is done by sub-consultants.

7.4 EXCEPTION TO THE RFP

An "exception" is defined as the Offeror's inability or unwillingness to meet a term, condition, specification, or requirement in the manner specified in the RFP. All exceptions taken must be identified and explained in writing and must specifically reference the relevant section(s) of this RFP. Other than exceptions that are stated in compliance with this Section, each proposal shall be deemed to agree to comply with all terms, conditions, specifications, and requirements of this RFP. If the Offeror provides an alternate solution when taking an exception to a requirement, the benefits of this alternate solution and impact, if any, on any part of the remainder of the Offeror's solution, must be described in detail.

7.5 MODIFICATION OR WITHDRAWAL OF PROPOSAL

Prior to the scheduled closing time for receiving proposals, any Offeror may withdraw their proposal. After the scheduled closing time for receiving proposals, no proposal may be withdrawn for 120 days. Only written requests for the modification or correction of a previously

submitted proposal that are addressed in the same manner as proposals and are received by the County prior to the closing time for receiving proposals will be accepted.

7.6 EQUAL EMPLOYMENT OPPORTUNITY

All Offerors will be required to follow Federal Equal Employment Opportunity (EEO) policies. Union County will affirmatively assure that on any project constructed pursuant to this advertisement, equal employment opportunity will be offered to all persons without regard to race, color, creed, religion, national origin, sex, and marital status, status with regard to public assistance, membership or activity in a local commission, disability, sexual orientation, or age.

7.7 MINORITY AND SMALL BUSINESS PARTICIPATION PLAN

It is the policy of Union County that Minority Businesses (MBEs), Disadvantaged Business Enterprises (DBEs) and other small businesses shall have the opportunity to compete fairly in contracts financed in whole or in part with public funds. Consistent with this policy, Union County will not allow any person or business to be excluded from participation in, denied the benefits of, or otherwise be discriminated against in connection with the award and performance of any contract because of sex, race, religion, or national origin.

7.8 LICENSES

The successful Firm(s) shall have and maintain a valid and appropriate business license (if applicable), meet all local, state, and federal codes, and have current all required local, state, and federal licenses.

7.9 E-VERIFY

E-Verify is the federal program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program, used to verify the work authorization of newly hired employees pursuant to federal law. Offeror/Firm shall ensure that Offeror and any Sub-Consultant performing work under this contract: (a) uses E-Verify if required to do so; and (ii) otherwise complies with applicable law.

7.10 DRUG-FREE WORKPLACE

During the performance of this Request, the Offeror agrees to provide a drug-free workplace for his employees; post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the workplace and specify the actions that will be taken against employees for violations of such prohibition; and state in all solicitations or advertisements for employees placed by or on behalf of the firm that the Offeror maintains a drug-free workplace.

For the purposes of this section, “drug-free workplace” means a site for the performance of work done in connection with a specific contract awarded to a Service Provider/Firm in accordance with this chapter, the employees of whom are prohibited from engaging in the

unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the Request.

7.11 INSURANCE

One or more of the following insurance limits may be required if it is applicable to the project. The County reserves the right to require additional insurance depending on the nature of the agreement.

At Contractor's sole expense, Contractor shall procure and maintain the following minimum insurances with insurers authorized to do business in North Carolina and rated A-VII or better by A.M. Best.

- A. **WORKERS' COMPENSATION**
(for any agreement unless otherwise waived by the Risk Manager)
Statutory limits (where Contractor has three or more employees) covering all employees, including Employer's Liability with limits of:
 - \$500,000 Each Accident
 - \$500,000 Disease - Each Employee
 - \$500,000 Disease - Policy Limit

- B. **COMMERCIAL GENERAL LIABILITY**
(for any agreement unless otherwise waived by the Risk Manager)
Covering Ongoing and Completed Operations involved in this Agreement.
 - \$2,000,000 General Aggregate
 - \$2,000,000 Products/Completed Operations Aggregate
 - \$1,000,000 Each Occurrence
 - \$1,000,000 Personal and Advertising Injury Limit
 - \$5,000 Medical Expense Limit

- C. **COMMERCIAL AUTOMOBILE LIABILITY**
(for any agreement involving the use of a contractor vehicle while conducting services associated with the agreement)
 - \$1,000,000 Combined Single Limit - Any Auto

- D. **PROFESSIONAL LIABILITY**
(for any agreement providing professional service such as engineering, architecture, surveying, consulting services, etc)
 - \$1,000,000 Claims Made

Contractor shall provide evidence of continuation or renewal of Professional Liability Insurance for a period of two (2) years following termination of the Agreement.

- E. **POLLUTION LIABILITY INSURANCE**
(for any agreement involving the clean-up or transportation of pollutants)

\$1,000,000 Claims Made

Contractor shall provide evidence of continuation or renewal of Pollution Liability Insurance for a period of two (2) years following termination of the Agreement.

- F. NETWORK SECURITY & PRIVACY LIABILITY (CYBER)
(for any agreement involving software applications)

\$1,000,000 Claims Made

Contractor shall provide evidence of continuation or renewal of Technology Errors & Omissions Insurance for a period of two (2) years following termination of the Agreement.

- G. Builder's Risk
(for any agreement involving above ground construction projects)
Amount of Contract

ADDITIONAL INSURANCE REQUIREMENTS

- A. The Contractor's General Liability policy shall be endorsed, specifically or generally, to include the following as Additional Insured:

UNION COUNTY, ITS OFFICERS, AGENTS AND EMPLOYEES ARE INCLUDED AS ADDITIONAL INSURED WITH RESPECTS TO THE GENERAL LIABILITY INSURANCE POLICY.

Additional Insured status for Completed Operations shall extend for a period of not less than three (3) years from the date of final payment.

- B. Before commencement of any work or event, Contractor shall provide a Certificate of Insurance in satisfactory form as evidence of the insurances required above.
- C. Contractor shall have no right of recovery or subrogation against Union County (including its officers, agents and employees).
- D. It is the intention of the parties that the insurance policies afforded by Contractor shall protect both parties and be primary and non-contributory coverage for any and all losses covered by the above-described insurance.
- E. Union County shall have no liability with respect to Contractor's personal property whether insured or not insured. Any deductible or self-insured retention is the sole responsibility of Contractor.
- F. Notwithstanding the notification requirements of the Insurer, Contractor hereby agrees to notify County's Risk Manager at 500 N. Main Street # 130, Monroe, NC 28112, within two (2) days of the cancellation or substantive change of any insurance policy set out herein.

Union, in its sole discretion, may deem failure to provide such notice as a breach of this Agreement.

- G. The Certificate of Insurance should note in the Description of Operations the following:

Department: _____
Contract #: _____

- H. Insurance procured by Contractor shall not reduce nor limit Contractor's contractual obligation to indemnify, save harmless and defend Union County for claims made or suits brought which result from or are in connection with the performance of this Agreement.

- I. Certificate Holder shall be listed as follows:

Union County
Attention: Union County Risk Manager
500 N. Main Street, Suite #130
Monroe, NC 28112

- J. If Contractor is authorized to assign or subcontract any of its rights or duties hereunder and in fact does so, Contractor shall ensure that the assignee or subcontractor satisfies all requirements of this Agreement, including, but not limited to, maintenance of the required insurances coverage and provision of certificate(s) of insurance and additional insured endorsement(s), in proper form prior to commencement of services.

7.12 INDEMNIFICATION

Contractor agrees to protect, defend, indemnify and hold Union County, its officers, employees and agents free and harmless from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees or other expenses or liabilities of every kind and character arising out of or relating to any and all claims, liens, demands, obligations, actions, proceedings, or causes of action of every kind in connection with or arising out of this agreement and/or the performance hereof that are due, in whole or in part, to the negligence of the Contractor, its officers, employees, subcontractors or agents. Contractor further agrees to investigate, handle, respond to, provide defense for, and defend the same at its sole expense and agrees to bear all other costs and expenses related thereto.

7.13 OWNERSHIP OF DATA AND TRANSITION

Any and all UCW data stored on the Contractor's servers or within the Contractors custody is the sole property of UCW. The Contractor, subcontractor(s), officers, agents, and assigns shall not make use of, disclose, sell, copy or reproduce UCW's data in any manner, or provide to any entity or person outside of UCW without the express written authorization of UCW.

In the event resulting Agreement is terminated for any reason, or upon expiration, and in addition to all other rights to property set forth, the Selected vendor shall:

- a. Incur no further financial obligations for materials, Services, or facilities under the Agreement without prior written approval of UCW;
- b. Terminate all purchase orders or procurements and any subcontractors and cease all work, except as UCW may direct, for orderly completion and transition; and
- c. Make available to UCW, at no cost, all UCW data stored within the system, stored on the Contractor's servers, or within the Contractor's custody, within fifteen (15) days of termination or UCW request. Such data shall be provided in a machine-readable format as agreed-upon by the parties.

In the event resulting Agreement is terminated for any reason, or upon expiration, and in addition to all other rights to property set forth, UCW shall:

- d. Retain ownership of all data, work products, and documentation, created pursuant to the resulting Agreement

7.14 DATA PRIVACY AND SECURITY

Contractor shall comply with all relevant federal, state, and local laws and regulations on security and privacy. Contractor shall have and follow a disaster recovery plan. Contractor shall only store and process UCW data within the continental United States. If applicable to the Contract, the Contractor shall back up all UCW data daily to an offsite hardened facility.

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8 APPENDIX A – COST PROPOSAL

RFP 2026-008 Program Management Services for Customer Information System Replacement Project

SUBMIT WITH PROPOSAL

Company Name _____

Respondents shall submit a complete and detailed **Cost Proposal** using the required format provided in **Attachment C2 – Cost Proposal Form**. The completed cost form must be included in the Proposal as **Appendix A – Cost Proposal**.

The Cost Proposal must include all anticipated costs for:

- Software licensing and subscription fees
- Implementation services
- Data migration and integration
- Training and documentation
- Annual maintenance and support
- Any optional modules, services, or add-ons

All pricing must be valid for at least 120 days from the proposal due date and should reflect complete, transparent, and competitive pricing for the full scope of work.

Failure to submit a complete Attachment C1 form may result in the proposal being deemed non-responsive.

Union County UB RFP – Attachment C1 – Cost Worksheets

[Attachment C1 - Cost Worksheets](#)

Union County UC RFP – Attachment C2 – Cost Narrative

[Attachment C2 - Cost Narrative](#)

Authorized Signature

Date

9 APPENDIX B – PROPOSAL SUBMISSION FORM

RFP 2026-008 Program Management Services for Customer Information System Replacement Project

SUBMIT WITH PROPOSAL

This Proposal is submitted by:

Company Legal Name: _____

Representative Name: _____

Representative Signature: _____

Representative Title: _____

Address: _____

City/State/Zip: _____

Email Address: _____

Phone Number: _____

Website Address: _____

It is understood that Union County reserves the right to reject any and all proposals, to make awards according to the best interest of the County, to waive formalities, technicalities, to recover and resubmit this project. Proposal is valid for 120 calendar days from the Proposal due date and is submitted by an executive of the company that has authority to contract with Union County, NC.

Name: _____

Title: _____

Signature: _____

Date: _____

10 APPENDIX C – ADDENDUM AND ANTI-COLLUSION FORM

RFP 2026-008 Program Management Services for Customer Information System Replacement Project

SUBMIT WITH PROPOSAL

Please acknowledge receipt of all addenda by including this form with your Proposal. Any questions or changes received will be posted as an addendum on www.co.union.nc.us and/or www.ips.state.nc.us. It is your responsibility to check for this information.

Addendum No.	Date Downloaded
_____	_____
_____	_____
_____	_____
_____	_____

I certify that this proposal is made in good faith and without collusion with any other offeror or officer or employee of Union County.

Company Name: _____
Name: _____
Title: _____
Email Address: _____
Signature: _____
Date: _____

11 APPENDIX D – PROPOSAL RESPONSE FORMS

RFP 2026-008 Program Management Services for Customer Information System Replacement Project

SUBMIT WITH PROPOSAL

Union County UB RFP – Attachment A - Proposal Response Forms

[Attachment A - Proposal Response Forms](#)

12 APPENDIX E – FUNCTIONAL AND TECHNICAL REQUIREMENTS/CAPABILITIES

RFP 2026-008 Program Management Services for Customer Information System Replacement Project

SUBMIT WITH PROPOSAL

Union County UB RFP – Attachment B – Functional and Technical Requirement/Capabilities

[Attachment B - Functional and Technical Requirement/Capabilities \(Excel\)](#)

[Attachment B - Functional and Technical Requirement/Capabilities \(PDF\)](#)



13 APPENDIX F – TEMPLATE CONTRACT

RFP 2026-008 Program Management Services for Customer Information System Replacement Project

DO NOT SUBMIT WITH PROPOSAL

STATE OF NORTH CAROLINA

AGREEMENT

COUNTY OF UNION

THIS AGREEMENT is made and entered into as of _____, by and between UNION COUNTY, a political subdivision of the State of North Carolina, whose address is 500 North Main Street, Monroe, NC 28112, hereinafter “Union,” and [Contractor’s full legal name], a [type of business (corporation, limited liability company, etc.) and state where incorporated], whose address is _____, hereinafter “Contractor.”

W I T N E S S E T H

WHEREAS, Union desires that Contractor perform certain [briefly describe services here] services; and

WHEREAS, Contractor is willing to perform such services as described in this Agreement.

NOW, THEREFORE, in consideration of the mutual covenants and agreements hereinafter set forth, the parties hereto do each contract and agree with the other as follows:

1. SERVICES PERFORMED. Contractor agrees to perform the services as set forth in the attached Scope of Work [or, if the full RFP is to be attached as the scope of work, state the RFP number and full RFP title], which is incorporated herein by reference (hereinafter the “Services”), in accordance with the terms of this Agreement.
2. FEE AND PAYMENT SCHEDULE. Union shall pay Contractor [insert payment amount or rate] for performance of the Services. Contractor shall invoice Union on a monthly basis for Services performed, or upon such other schedule as may be agreed upon by the parties. Payment is due within thirty (30) days of receipt of an accurate invoice by Union’s Finance Division. All payments shall be conditioned upon appropriation by the Union County Board of Commissioners of sufficient funds for each request for services.
3. TERM AND TERMINATION. The Effective Date is the date of mutual execution of this Agreement. This Agreement shall have a term of [insert agreement time length] (the “Initial Term”). [The following sentence to be used only if renewals might be needed or desired, and then only if the RFP lists the possible number of renewals. If the contract is just for a single term, this sentence may be deleted.] Upon completion of the Initial Term, Union may, in its sole discretion, elect to renew this Agreement for up to ___[number of possible additional terms, as stated in the RFP] additional ___[number of years in each renewal term]-year terms, each a “Renewal Term,” upon written notice to the Contractor. Union may terminate this Agreement at any time, without cause, upon provision of ten (10) days’ written notice to Contractor. In the event of termination without cause, Contractor shall be paid for services performed to the date of notification of termination by Union.
4. OWNERSHIP OF DOCUMENTS. All deliverables and any other contract documents prepared by Contractor, or any subcontractors or subconsultants under the terms of this Agreement (“the Documents”), shall be the property of Union. Contractor further acknowledges that Union is subject to Chapter 132 of the North Carolina General Statutes, the Public Records Act (the

“Act”), and that this Agreement, as well as any of the Documents as defined herein, shall be a public record as defined in such Act, and as such, will be open to public disclosure and copying.

5. INSURANCE. The attached Exhibit A, Insurance Requirements, is incorporated herein by reference.

6. INDEMNIFICATION. Contractor agrees to protect, defend, indemnify and hold Union, its officers, employees and agents free and harmless from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees or other expenses or liabilities of every kind and character arising out of or relating to any and all claims, liens, demands, obligations, actions, proceedings, or causes of action of every kind in connection with or arising out of this Agreement and/or the performance hereof that are due, in whole or in part, to the negligence of Contractor, its officers, employees, subcontractors or agents. Contractor further agrees to investigate, handle, respond to, provide defense for, and defend the same at its sole expense and agrees to bear all other costs and expenses related thereto.

7. DECLARATION BY CONTRACTOR. Contractor declares that Contractor has complied with all federal, state and local laws regarding business permits, certificates, and licenses that may be required to carry out the work to be performed under this Agreement.

8. FEDERAL, STATE, AND LOCAL TAXES. Neither federal, nor state, nor local income tax nor payroll tax of any kind shall be withheld or paid by Union on behalf of Contractor or the employees of Contractor. Contractor shall not be treated as an employee with respect to the services performed hereunder for federal or state tax purposes.

9. NOTICE TO CONTRACTOR REGARDING ITS TAX DUTIES AND LIABILITIES. Contractor understands that Contractor is responsible to pay, according to law, Contractor’s income tax. If Contractor is not a corporation, Contractor further understands that Contractor may be liable for self-employment (social security) tax, to be paid by Contractor according to law.

10. FRINGE BENEFITS. Because Contractor is engaged in Contractor’s own independently established business, Contractor is not eligible for, and shall not participate in, any employee pension, health or other fringe benefit plan of Union.

11. UNION NOT RESPONSIBLE FOR WORKERS’ COMPENSATION. No workers’ compensation insurance shall be obtained by Union concerning Contractor or the employees of Contractor. Contractor shall comply with the workers’ compensation law concerning Contractor and the employees of Contractor.

12. NO AUTHORITY TO BIND UNION. Contractor has no authority to enter into contracts or agreements on behalf of Union. This Agreement does not create a partnership or any form of agency between the parties.

13. ASSIGNMENT. Neither Union nor Contractor shall assign, sublet or transfer any rights under or interest in this Agreement (including, but without limitation, monies that may become due or monies that are due) without the written consent of the other, except to the extent that any assignment, subletting or transfer is mandated by law or the effect of this limitation may be restricted by law. Unless specifically stated to the contrary in any written consent to assignment, no

assignment shall release or discharge the assignor from any duty or responsibility under this Agreement.

14. NON-WAIVER. The failure of either party to exercise any of its rights under this agreement for a breach thereof shall not be deemed to be a waiver of such rights or a waiver of any subsequent breach.

15. HOW NOTICES SHALL BE GIVEN. Any notice given in connection with this agreement shall be given in writing and shall be delivered either by hand to the party or by certified mail, return receipt requested, to the party at the party's address stated herein. Any party may change its address stated herein by giving notice of the change in accordance with this paragraph.

16. APPLICABLE LAW AND JURISDICTION. This Agreement shall be construed and enforced in accordance with the laws of the State of North Carolina. The parties to this Agreement confer exclusive jurisdiction of all disputes arising hereunder upon the General Courts of Justice of Union County, North Carolina.

17. COMPLETE AGREEMENT. This Agreement contains the complete agreement of the parties regarding the terms and conditions of the Agreement, and there are no oral or written conditions, terms, warranties, understandings or other agreements pertaining thereto which have not been incorporated herein. This Agreement may be modified only by written instrument duly executed by both parties, or their respective successors in interest.

18. SEVERABILITY. The provisions hereof are severable, and should any provision be determined to be invalid, unlawful or otherwise null and void by any court of competent jurisdiction, the other provisions shall remain in full force and effect and shall not thereby be affected unless such ruling shall make further performance hereunder impossible or impose an unconscionable burden upon one of the parties.

19. AUTHORITY. Each party warrants that it has the corporate or other organizational power and authority to execute, deliver and perform this Agreement. Each party further warrants that the execution, delivery and performance by it of the Agreement has been duly authorized and approved by all requisite action of the party's management and appropriate governing body.

20. E-VERIFY. E-Verify is the federal program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program, used to verify the work authorization of newly hired employees pursuant to federal law. Contractor shall ensure that Contractor and any subcontractor performing work under this Agreement: (i) uses E-Verify if required to do so by North Carolina law; and (ii) otherwise complies with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes. A breach of this provision by Contractor will be considered a breach of this Agreement, which entitles Union to terminate this Agreement, without penalty, upon notice to Contractor.

[Signatures follow on the next page.]

IN WITNESS WHEREOF, the parties hereto, acting under authority of their respective governing bodies, have hereunto set their hands and seals, and have caused this Agreement to be duly executed, this the day and year first above written.

UNION COUNTY

By: _____ (SEAL)
Brian W. Matthews, County Manager

[CONTRACTOR'S FULL LEGAL NAME]

By: _____ (SEAL)

Approved as to Legal Form _____

This instrument has been preaudited in the manner required by The Local Government Budget and Fiscal Control Act.

Deputy Finance Officer

Exhibit A
Insurance Requirements

I. BASIC INSURANCE REQUIREMENTS. At Contractor's sole expense, Contractor shall procure and maintain the following minimum insurances with insurers authorized to do business in North Carolina and rated A-VII or better by A.M. Best, or as otherwise authorized by the Union County Risk Manager.

A. WORKERS' COMPENSATION

Statutory (coverage for three or more employees) limits covering all employees, including Employer's Liability with limits of:

\$500,000	Each Accident
\$500,000	Disease - Each Employee
\$500,000	Disease - Policy Limit

B. COMMERCIAL GENERAL LIABILITY

Covering all operations involved in this Agreement.

\$2,000,000	General Aggregate
\$2,000,000	Products/Completed Operations Aggregate
\$1,000,000	Each Occurrence
\$1,000,000	Personal and Advertising Injury Limit

C. COMMERCIAL AUTOMOBILE LIABILITY

\$1,000,000	Combined Single Limit - Any Auto
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D. PROFESSIONAL LIABILITY

\$1,000,000	Claims Made
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Contractor shall provide evidence of continuation or renewal of Professional Liability Insurance for a period of two (2) years following termination of the Agreement.

E. POLLUTION LIABILITY INSURANCE

\$1,000,000	Claims Made
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Contractor shall provide evidence of continuation or renewal of Pollution Liability Insurance for a period of two (2) years following termination of the Agreement.

F. NETWORK SECURITY & PRIVACY LIABILITY (CYBER)

\$1,000,000 Claims Made
\$3,000,000 Aggregate Limit

Contractor shall provide evidence of continuation or renewal of Network Security & Privacy Liability Insurance for a period of two (2) years following termination of the Agreement.

II. **ADDITIONAL INSURANCE REQUIREMENTS.**

A. The Contractor's General Liability policy shall be endorsed, specifically or generally, to include the following as Additional Insured:

UNION COUNTY, ITS OFFICERS, AGENTS AND EMPLOYEES ARE INCLUDED AS ADDITIONAL INSURED WITH RESPECT TO THE GENERAL LIABILITY INSURANCE POLICY.

B. Before commencement of any work or event, Contractor shall provide a Certificate of Insurance in satisfactory form as evidence of the insurances required above.

C. Contractor shall have no right of recovery or subrogation against Union County (including its officers, agents and employees).

D. It is the intention of the parties that the insurance policies afforded by Contractor shall protect both parties and be primary and non-contributory coverage for any and all losses covered by the above-described insurance.

E. Union County shall have no liability with respect to Contractor's personal property whether insured or not insured. Any deductible or self-insured retention is the sole responsibility of Contractor.

F. Notwithstanding the notification requirements of the Insurer, Contractor hereby agrees to notify County's Risk Manager at 500 North Main Street, Monroe, NC 28112, within two (2) days of the cancellation or substantive change of any insurance policy set out herein. Union, in its sole discretion, may deem failure to provide such notice as a breach of this Agreement.

G. The Certificate of Insurance should note in the Description of Operations the following:

Department: _____
Contract #: _____

H. Insurance procured by Contractor shall not reduce nor limit Contractor's contractual obligation to indemnify, save harmless and defend Union County for claims made or suits brought which result from or are in connection with the performance of this Agreement.

I. Certificate Holder shall be listed as follows:

Union County
Attention: Risk Manager
500 North Main Street
Monroe, NC 28112

J. If Contractor is authorized to assign or subcontract any of its rights or duties hereunder and in fact does so, Contractor shall ensure that the assignee or subcontractor satisfies all requirements of this Agreement, including, but not limited to, maintenance of the required insurances coverage and provision of certificate(s) of insurance and additional insured endorsement(s), in proper form prior to commencement of services.