

**ENTERPRISE RESOURCE PLANNING (ERP) SOFTWARE AND
IMPLEMENTATION SERVICES**

REQUEST FOR PROPOSALS

RFP NO: 27-1004



catawba county

MAKING. LIVING. BETTER.

Date of Issue: August 31, 2026

Proposals Due: October 7, 2026

Time: 3:00 PM ET

**Issued by:
Catawba County Purchasing Manager
25 Government Drive
Newton, North Carolina 28658
(828) 465-8224**

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SECTION 1 – ADVERTISEMENT

ENTERPRISE RESOURCE PLANNING (ERP) SOFTWARE AND IMPLEMENTATION SERVICES REQUEST FOR PROPOSALS RFP NO: 27-1004

Pursuant to NCGS § 143-129.8 and NCGS § 143-135.9, Catawba County (hereinafter “County”) is soliciting proposals from qualified vendors to provide an enterprise resource planning (ERP) solution to replace and modernize the systems supporting the County’s financial, procurement, human resources, payroll, and related administrative business processes. The County is seeking an integrated, efficient, and user-friendly solution that will support current operational needs, improve business processes, enhance system functionality and reporting, and provide flexibility to accommodate future growth and evolving County requirements.

The complete RFP document and details are located on the Catawba County Bid Notices webpage at: <https://www.catawbacountync.gov/county-services/purchasing/bid-notices/>

Sealed proposals will be received at the address indicated in the table below, no later than **3:00 PM on October 7, 2026**. Each envelope should be clearly labeled with: RFP 27-1004: Enterprise Resource Planning (ERP) Project. Proposals received will remain confidential until contract is awarded.

Mailing address for delivery of proposal via US Postal Service	Office Address of delivery by any other method (hand delivery, overnight, or any other carrier)
RFP No: 27-1004 Catawba County Government Center Attn: Purchasing Department Post Office Box 389 Newton, North Carolina 28658	RFP No: 27-1004 Catawba County Government Center Attn: Purchasing Department 25 Government Drive Newton, North Carolina 28658

To accommodate Proposal questions, Proposer shall submit written questions by email to Tina Wright at tinawright@catawbacountync.gov by September 21, 2026, at 5:00 PM ET. Proposer should enter “RFP #: 27-1004 – Questions” as the subject for the email. Questions received prior to the submission deadline date, the County’s response, and any additional terms deemed necessary by the County will be posted in the form of an addendum to the County website referenced above, by September 25, 2026, at 5:00 PM ET.

The County reserves the right to reject any and all proposals and to waive informalities as may be permitted by law.

This Advertisement is issued by:

Owner: Catawba County Purchasing Department
By: Tina M. Wright, Purchasing Manager
Date: August 31, 2026

SECTION 2 – INTRODUCTION

2.1 INTRODUCTION

Pursuant to NCGS § 143-129.8 and NCGS § 143-135.9, Catawba County (hereinafter “County”) is soliciting proposals from qualified vendors to provide an enterprise resource planning (ERP) solution to replace and modernize the systems supporting the County’s financial, procurement, human resources, payroll, and related administrative business processes. The County is seeking an integrated, efficient, and user-friendly solution that will support current operational needs, improve business processes, enhance system functionality and reporting, and provide flexibility to accommodate future growth and evolving County requirements.

2.2 DEFINITIONS

The following definitions are used in the RFP:

Term	Definition
Bidder	A firm, company, or organization responding to this RFP to provide software, implementation services, or both.
Change order	A written document signed by the County and issued to the bidder that alters scope, schedule, compensation, or other contract terms.
Client / County	County of Catawba, NC
Confidential information	Information that may be exempt from public disclosure or may include sensitive personal, financial, operational, legal, or security information.
Key staff	Bidder or subcontractor personnel whose experience, skills, availability, or role are material to delivery of the proposed scope.
Personal data	Information identifiable to an individual, including but not limited to names, contact information, identifiers, payroll or benefits data, and other sensitive information.
Preexisting material	Proprietary products, software, methods, tools, templates, or other materials delivered or used by the bidder that existed before this contract.
Proprietary information	Information owned by the contractor to which the contractor claims a protectable interest under applicable law.
Subcontractor	An individual, firm, partnership, corporation, joint venture, or other entity contracted to furnish services, labor, equipment, materials, software, or other components required for the project.

2.3 COUNTY BACKGROUND

Catawba County is a unit of local government in the State of North Carolina with a current population of approximately 163,000. Catawba County has a commissioner-manager form of government. The five members of the Board of County Commissioners are elected in a partisan election by qualified voters for overlapping four-year terms of office.

2.4 PROJECT BACKGROUND

Catawba County is pursuing an enterprise resource planning (ERP) replacement initiative to modernize the systems that support its financial, procurement, human resources, payroll, and related administrative business processes. The County has relied on Oracle PeopleSoft for Financials, Supply Chain Management, and Human Capital Management for more than 25 years. While staff have continued to complete critical work through the current environment, the County has identified opportunities to reduce manual effort, improve integration, strengthen reporting and analytics, and provide a more modern user experience for staff.

The County completed an ERP needs assessment to evaluate current business processes, technology limitations, and opportunities for improvement. The assessment identified the need for a modern ERP platform that can better support core financials, budgeting, procurement, contract management, project and grant accounting, human resources, payroll, timekeeping, reporting, workflow, and document management. The County is now proceeding with a structured selection process to identify a cloud-based solution and implementation partner capable of meeting current requirements while positioning the County for long-term operational improvement.

2.5 ROLE OF PLANTE MORAN

The County hired Plante Moran to provide advisory services for the County's ERP replacement project including facilitation of the RFP and proposal evaluation process. All decision-making, including vendor scoring and selection, is the responsibility of the County.

2.6 PROJECT OBJECTIVES

The County's primary objectives for this project include:

- Replace the County's legacy Oracle PeopleSoft environment with a modern, cloud-based ERP solution that supports financial, procurement, human resources, payroll, timekeeping, reporting, workflow, and related administrative processes.
- Improve operational efficiency by reducing manual, paper-based, spreadsheet-based, and duplicate-entry processes; standardizing workflows; and increasing staff productivity across departments.
- Increase access to timely, accurate, and actionable data through improved reporting, dashboards, analytics, integrated document management, and better data flow between systems and functional areas.
- Support business process improvement and change readiness by implementing leading-practice workflows, clear roles and responsibilities, automated approvals, stronger controls, and improved user experience.
- Select an implementation partner that can provide strong project management, change management, training, knowledge transfer, technical guidance, data migration, integrations, and post-go-live support.

2.7 DESIRED BUSINESS OUTCOMES BY FUNCTIONAL AREA:

Functional Area	Desired Business Outcomes
General Ledger & Financial Management	Modernize core financial processing, improve access to subledger detail, enable more frequent period-end controls, reduce manual journal entry work, and provide finance users with flexible reporting tools that reduce reliance on external reporting support.
Accounts Receivable and Misc. Billing	Improve billing, receipting, and cash application processes through stronger integration with financial records, streamlined miscellaneous billing, improved transaction visibility, and reduced manual reconciliation effort.
Accounts Payable	Standardize invoice intake, approval, matching, and payment workflows; improve vendor management and duplicate vendor controls; support recurring invoices and EFT notifications; and reduce manual follow-up between departments and finance.
Budgeting & Planning	Support personnel budgeting, forecasting, projections, budget amendments, capital planning, and budget book preparation within a more centralized and automated environment that reduces spreadsheet dependency and improves transparency.
Procurement & Contract Management	Strengthen purchasing controls, contract tracking, vendor self-service, document storage, purchase order rollover, multi-year encumbrance tracking, and visibility into contract insurance and compliance requirements.
Capital Assets & Inventory	Centralize fixed asset and inventory information where practical, improve reporting and lifecycle visibility, reduce dependence on spreadsheets or external systems, and support better linkage between asset, inventory, budget, and general ledger data.
Project & Grant Accounting	Provide stronger project and grant accounting capabilities, including centralized tracking, automated notifications, reimbursement support, milestone tracking, audit trails, and reporting that reduces reliance on manual spreadsheets and shared folders.
Human Resources	Establish a stronger HR system of record that supports position control, personnel actions, benefits, leave tracking, onboarding, offboarding, employee records, and electronic approvals while reducing paper, PDF, and spreadsheet-based processes.
Payroll & Timekeeping	Improve payroll and timekeeping through electronic time entry and approval workflows, reduced manual timecard manipulation, stronger integration with departmental systems, automated payroll reports, and improved reconciliation support.
Recruitment, Learning & Performance	Support recruiting, candidate tracking, onboarding, learning management, performance management, training tracking, and employee development within a modern platform that improves visibility for HR, departments, and employees.
Employee Self-Service	Expand employee self-service capabilities for pay information, tax and direct deposit changes, benefits enrollment and life events, leave information, time entry, and other common employee transactions.

Reporting, Analytics & Dashboards	Provide user-friendly reporting, dashboards, ad hoc query capabilities, scheduled report delivery, and analytics tools that allow departments and leadership to access accurate information without excessive manual downloading or manipulation.
Document Management & Workflow	Enable electronic workflow, approvals, notifications, and transaction-level document storage so users can find supporting documentation more easily, reduce printing and scanning, and improve auditability of business processes.

2.8 CURRENT APPLICATION ENVIRONMENT

Legend Code		Description
R	Replacement	The County intends to replace this application with the selected solution.
C	Consider	The County will consider replacing this application with the selected solution based on the strength of the finalist bidder's offering and the cost/benefit of the replacement module.
M	Maintain	The County intends to retain the application, not replace it, through this effort.
I	Interface	The County intends to keep the application and interface/integrate it with the selected solution.
C/I	Consider/Interface	The County will consider replacing this application with the selected solution based on the strength of the finalist bidder's offering and the cost/benefit of the replacement module. If the County maintains this application, it would require an interface to the ERP. Therefore, the bidder must provide interface experience and pricing for these applications.

Current application	Application notes/description	Likely future of system? *
PeopleSoft	Core ERP system for financials and human resources functions	Replace
NeoGov	Recruiting system	Consider Replacing and Integrate if Maintained
Power DMS	Training tracking and policy management (EMS / Sheriff)	Consider Replacing and Integrate if Maintained
BenefitSolver	Benefits Administration/ COBRA	Integrate

Current application	Application notes/description	Likely future of system? *
ACADIS	State training and certification tracking (Sheriff / public safety)	Integrate
NCSW Learn	State-managed training tracking (Social Services)	Integrate
HealthStream	Training and learning management (Public Health)	Integrate
		Consider Replacing and Integrate if Maintained
SharePoint	HR Checklists/Document Repository.	
Outlook Calendar	Employee scheduling and shift assignments (EMS, Library)	Replace
When2Work	Workforce scheduling and shift management	Replace
Code Red	Notification / communication system used by departments	Maintain
SmartGov	Permitting and inspections management	Integrate
ArcGIS	Mapping and GIS for inspections and routing	Maintain
Trimble	Fleet maintenance and asset management	Maintain
Inventory System <i>multiple (jail, Trimble, Power DMS, Fuel track)</i>	Inventory tracking for parts, uniforms, fuel	Maintain
Excel / Spreadsheets	Budgeting, reporting, certification tracking, employee compensation support, HR reporting, payroll support, and tracking. HR workflow approvals. Custom Timekeeping Day Sheet for Social Services/Public Health.	Replace
Google Forms + Spreadsheet	Professional development tracking (Library)	Replace
Paper / Manual Processes	Timekeeping, onboarding/offboarding, evaluations	Replace
BadgePass	Badging and access control system	Maintain
NCIR	Immunization tracking system (Public Health)	Maintain
OneDrive	Grant tracking repository	Replace
		Consider Replacing and Integrate if Maintained
Velocity	Credit card processing	
Truist Bank	Lockbox payments	Integrate
		Consider Replacing and Integrate if Maintained
PlanetBids	Formal bid solicitation	
Laserfiche	Contract document storage and workflow management. Employee Records and Document Management (HR).	Replace

Current application	Application notes/description	Likely future of system? *
DocuSign	Contract signatures	Consider Replacing and Integrate if Maintained
Microsoft Power BI	Financial reporting and analysis	Replace
CCH ProSystem fx Engagement	ACFR reporting	Replace
Envision	ACFR reporting	Replace
Fuel Master	Fuel inventory tracking	Maintain
Bi-Tek	Tax revenue and collections	Integrate
Forte	Online payments for tax	Consider Replacing and Integrate if Maintained
Truist	ACH file uploads	Integrate
CureMD	Public Health billing	Integrate
Permitium	Sheriff's Office gun permits	Integrate
Bank of America	Procurement Card Downloads	Integrate

2.9 CURRENT TECHNICAL ENVIRONMENT

As part of the proposal process, bidders will be required to submit significant technical details about the proposed solution. Any potential conflicts with the County's current technical environment must be noted in the Technical and Bidder Hosting Requirements Form in **Attachment A – RFP for ERP Software and Implementation Services – Bidder Forms.docx**.

- Bandwidth: 2 1 GB connections
- Remote access and/or VPN used: Global Protect
- Active directory: MS AD

2.10 SUMMARY OF ORGANIZATION METRICS (APPROXIMATE)

Metric	Current
Population	168,248
Form of government	Local County Government
Jurisdictional area (Square Miles)	414
Residential units	Approximately 78K
Number of departments	19
Budget (general fund)	\$272M

Metric	Current
Budget (all funds)	\$353M
Total staff (full time: 1FTE)	1098
Total staff (part time: 0.5 FTE)	65 between .50 -.90 FTE plus 334 hourly PRN
Number of IT users	5
Current ERP users	1200
Future ERP basic users (only use time entry, employee self-service, etc.)	900
Power users: Finance	15
Power users: HR	11
General ledger/bank reconciliation	
Current chart of accounts structure:	Fund-Dept ID-GL Account-Project Code (if applicable); Assets, Liabilities, Equity (Fund Balance)
Chart segment one name/account mask	Fund-3 digits
Chart segment two name/account mask	Dept ID –6 digits
Chart segment three name/account mask	GL Accounts-6 Digits
Chart segment four name/account mask	Project code – 5 Digits
Fiscal year end	6/30
Number of funds	43
Number of department codes	154
Number of expense accounts	1,110
Number of revenue accounts	1,551
Number of project numbers	160
Number of bank accounts	9
Budgeting	
Budget frequency	Annually
Number of funds budgeted	37
Fixed/capital assets	
Number of capitalized fixed assets	1,605
Fixed asset tagging?	Yes
Fixed asset capitalization threshold	\$5,000
Project/grant accounting	

Metric	Current
Do projects/grants cross funds?	Generally, no but infrequently does occur.
Do projects/grants cross departments?	Generally, no but infrequently does occur.
Purchasing/contract management	
Use of NIGP/commodity codes?	No
Number of requisitions per month	120
Number of purchase orders per month	120
Number of vendors in purchasing system	7,673
Average frequency of physical inventories	Annually
Accounts payable	
Number of invoices input annually	19,660
Frequency of check/EFT runs	Weekly
Check signature method	Electronic
Payment types supported	ACH, Check, E-payables
Number of 1099s processed annually	207
Cash receipting	
Receipting model (centralized or decentralized)	Currently centralized – departments don't have receipting software currently
Number of cash registers/POS terminals	35
Human resources	
Number of permanent employees	1254.45 FTEs
Number of part-time employees	Included in above number
Number of seasonal employees	No seasonal employees but have 334 hourly PRN staff
Number of benefit plans offered	18 (excluding leave programs)
Number of bargaining units	1

SECTION 3 – SCOPE

3.1 SCOPE OVERVIEW

The County seeks a qualified bidder to provide and implement a modern, cloud-based ERP solution that replaces its legacy PeopleSoft environment and supports financial management, budgeting, procurement, contract management, project and grant accounting, human resources, payroll, timekeeping, reporting, workflow, and document management. The selected bidder will deliver an integrated, user-friendly solution and the implementation services necessary to reduce manual processes, improve data access and reporting, strengthen controls and workflows, and position the County for long-term operational improvement.

3.2 SCOPE OF SYSTEM SOLUTION

The County requires responding bidders to propose a cloud solution, including software, implementation services, project management, on-going software support, and other technology services for the entire scope of the project.

To the extent bidder is able, the County is looking for the bidder to utilize standard, out-of-the-box business processes where possible, with targeted configurations and flexibility when needed. The following definitions should be considered relative to the scope list below:

Response options:

- Bidders must provide all areas listed in the Core components. Bidders can respond to modules with their own products, or they may partner with other bidders to submit a proposal that meets the software scope listed below.
- Bidders may optionally respond to the Expanded components using either their own software/services or by partnering with another vendor.

3.3 SCOPE OF SOFTWARE

The following definitions should be considered relative to the scope list below:

Core/required application software:

Financial	Human resources/payroll
Accounts payable	Employee benefits
Accounts receivable and miscellaneous billing	Employee & Manager self service
Bank reconciliation	Learning management
Budgeting and performance management	Offboarding
Cash management	Performance management
Cashiering	Personnel actions
Contract management	Position control, classification, and compensation
Financial reporting	Payroll
Fixed assets	Recruiting and onboarding
General ledger	Time entry
Grant management	
Project accounting	
Purchasing	

Expanded/optional application software:

Financial	Human resources/payroll
Bid management	Risk management

3.4 SCOPE OF SERVICES

Required implementation services:

- Project management
- Software installation/set-up
- Security design and configuration
- Business design/software configuration
- Technical design and standards
- Data conversion and migration
- Business analytics, reports, and form development
- Integration and interface development
- Software modifications (if necessary, based on response to functional requirements)
- Testing
- Training services
- Change management
- Knowledge transfer to staff
- System documentation development
- Go-Live Support
- Ongoing support and maintenance services
- Ongoing cloud hosting services

SECTION 4 – PROPOSAL INFORMATION

4.1 GENERAL INFORMATION

This RFP is intended to provide Proposers with a common, uniform set of instructions to assist them in the development of their proposals and to provide a uniform method for the County to fairly evaluate proposals and subsequently select a proposal that provides ERP software and implementation services. Proposers are encouraged to initiate preparation of proposals immediately upon receipt of the RFP in order for all relevant questions and information needs to be identified and answered, and to allow adequate time to prepare a comprehensive and completed response.

This RFP is comprised of the base RFP document, any attachments, and any addenda released before Contract award, which are incorporated herein by reference.

4.2 RFP SCHEDULE

The table below shows the *intended* schedule for this RFP. County will make every effort to adhere to this schedule.

Event	Responsibility	Date and Time
Issue RFP	County	August 31, 2026
Submit Written Questions	Proposer	September 21, 2026 at 5:00 PM
Provide Responses to Questions	County	September 25, 2026 at 5:00 PM
Submit Sealed Proposals	Proposer	October 7, 2026 at 3:00 PM
Shortlisted vendor demonstrations and interviews	County/Proposer	Anticipated first two weeks of November 2026
Contract Award	County	TBA
Contract Effective Date	County	TBA

4.3 PROPOSAL QUESTIONS

Upon review of the RFP documents, Proposer(s) may have questions to clarify or interpret specifications in order to submit the best proposal possible. To accommodate the Proposal Questions process, Proposer shall submit any such questions by the above due date. Written questions shall be emailed to tinawright@catawbacountync.gov by the date and time specified above. Proposer should enter “RFP #: 27-1004 – Questions” as the subject for the email. Questions received prior to the submission deadline date, the County’s response, and any additional terms deemed necessary by the County will be posted in the form of an addendum to the County website, <https://www.catawbacountync.gov/county-services/purchasing/proposal-notice/> and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any County personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Proposer shall rely only on written material contained in an Addendum to this RFP.

4.4 PROPOSAL SUBMITTAL

Sealed proposals, subject to the conditions made a part hereof, will be received at the address indicated in the next page, no later than **3:00 PM on October 7, 2026**. Each envelope should be clearly labeled with: RFP 27-1004: Enterprise Resource Planning (ERP) Project.

Mailing address for delivery of proposal via US Postal Service	Office Address of delivery by any other method (hand delivery, overnight, or any other carrier)
RFP No: 27-1004 Catawba County Government Center Attn: Purchasing Department Post Office Box 389 Newton, North Carolina 28658	RFP No: 27-1004 Catawba County Government Center Attn: Purchasing Department 25 Government Drive Newton, North Carolina 28658

IMPORTANT NOTE: All proposals shall be physically delivered to the office address listed above on or before the submission deadline in order to be considered timely, regardless of the method of delivery. **This is an absolute requirement.** All risk of late arrival due to unanticipated delay—whether delivered by hand, U.S. Postal Service, courier or other delivery service is entirely on the Proposer(s). It is the sole responsibility of the Proposer to have proposals physically in this Office by the specified time and date above. Attempts to submit a proposal via facsimile (FAX) machine, telephone or electronic means, including but not limited to email, in response to this RFP will **not** be accepted.

Proposals must be submitted as **one (1) original hard copy and one (1) electronic PDF copy on a USB thumb drive**. Proposals must include all required files and components as described in section 6.1 of this RFP. Each Proposer must thoroughly examine the RFP to ensure that the Proposer can meet all requirements of this RFP. When responding to this RFP, please follow all instructions carefully. Failure to follow these instructions in your proposal may be considered a non-responsive submission and may result in immediate elimination from further consideration.

Critical updated information may be included in Addenda to this RFP. It is important that all Proposers responding to this RFP periodically check the County website for any Addenda that may be issued prior to the proposal due date or complete Attachment E – Intent to Propose and submit back to County at tinawright@catawbacountync.gov to be notified when Addenda are issued. All Proposers shall be deemed to have read and understood all information in this RFP and all Addenda thereto.

Offers submitted pursuant to this RFP are valid for ninety (90) days after Proposal due date. Pursuant to NCGS § 143-129.8, Proposals received will remain confidential until a contract is awarded.

4.5 REJECTION OF PROPOSALS

Catawba County reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP. The County also reserves the right at its sole discretion to waive minor administrative irregularities contained in any proposal. Failure to comply with any of the terms and conditions of this RFP will result in rejection of a proposal. The County reserves the right to negotiate any and all terms with the successful Proposer.

SECTION 5 – PROPOSAL EVALUATION AND AWARD

5.1 PROPOSAL EVALUATION PROCESS

The County shall evaluate all Proposer responses to confirm they meet the specifications and requirements of the RFP.

5.1.1 **Minimum criteria:** As part of the bidder's RFP response, the following minimum criteria must be met for a proposal to be considered for further evaluation. Failure to meet all criteria will automatically disqualify the bidder's response from further consideration:

Minimum Criteria Checklist
▪ RFP response timeliness RFP response is submitted by the due date and time.
▪ Response authorization The RFP response is signed by an authorized company officer.
▪ Response completeness The bidder complied with all instructions in the RFP and responded to all items requested with sufficient detail, allowing for the proposal to be properly evaluated. Any deficiencies in this regard will be determined at the sole discretion of the County to be either a defect that will be waived or that the proposal can be sufficiently modified to meet the requirements of the RFP.
▪ Data must reside in the United States The proposed software solution must only utilize data centers/storage within the United States.
▪ Minimum client software installations: System Software/Integrator must have implemented proposed software for three (3) similar organizations of similar size and complexity in the previous 5 years.

5.1.2 **Round 2 evaluation:** For those bidders whose proposals pass the minimum criteria, the following categories of criteria will be used to further evaluate the proposals:

Round 2 Evaluation Criteria	Weighting
Functionality including integrations with County systems	30%
Technical and Support (security, SLA's, integration tools, frequency of new releases, etc.)	20%
Implementation approach, staffing, and division of responsibility	20%
Cost (value-based scoring)	15%
Vendor Experience, Stability, Etc.	15%
Total	100%

5.1.3 **Round 3 evaluation:** The top bidders in the second-round evaluation will then proceed to an additional level of due diligence that may include the following activities:

- Follow-up questions and answers with the bidders.
- Bidder demonstrations/interviews to include functionality demonstrations, technical demonstrations, service presentations, and other due diligence.
- Reference checking with comparable entities.

- At any point in time during the third round of evaluation, a bidder may be eliminated from further consideration. After the round three activities, the finalist bidders will be evaluated on all information collected to date against the following criteria in order of preference:

Round 3 Evaluation Criteria	Weighting
Functionality including integrations with County systems	30%
Technical and Support (security, SLA's, integration tools, frequency of new releases, etc.)	20%
Implementation approach, staffing, and division of responsibility	20%
Cost (value-based scoring)	15%
Vendor Experience, Stability, Etc.	15%
Total	100%

Upon completion of the evaluation process, the County will make award(s) based on the proposal(s) that best meet the criteria as set out in this RFP. Award of a Contract to one Proposer does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was deemed most advantageous and represented the best value to the County. Proposers must be registered with the North Carolina Secretary of State, in good standing, and authorized to do business in the State of North Carolina.

Proposers are cautioned that this is a request for proposals, not an offer or request to contract, and the County reserves the unqualified right to reject any and all offers at any time if such rejection is deemed to be in the best interest of the County.

5.2 METHOD OF AWARD

In accordance with NCGS § 143-129.8, "Contracts shall be awarded to the person or entity that submits the best overall proposal as determined by the County". In addition, the County may negotiate with any Proposer in order to obtain a final contract that best meets the needs of County. However, negotiations will not alter the original intent of the scope of services.

If the County cannot successfully negotiate a contract with the highest ranked proposer, the County will terminate negotiations and begin negotiations with the next highest ranked proposer.

SECTION 6 – PROPOSAL RESPONSE FORMAT

6.1 RESPONSE OVERVIEW

To facilitate the analysis of responses to this RFP, the bidder is required to prepare their proposals in accordance with the instructions outlined in this section. **Bidders must respond in full to all RFP sections and follow the RFP format (section numbering, etc.) in their response. Failure to follow these instructions may result in rejection.**

Proposals shall be prepared to satisfy the requirements of the RFP. *EMPHASIS SHOULD BE CONCENTRATED ON ACCURACY, COMPLETENESS, AND CLARITY OF CONTENT.* All parts, pages, figures, and tables should be numbered and labeled clearly. The proposal should be submitted to address the following items:

1. Executive Summary
2. Attachment A – RFP for ERP Software and Implementation Services - Bidder Forms.docx
3. Attachment B – RFP for ERP Software and Implementation Services - Pricing Forms.xlsx
4. Attachment C – RFP for ERP Software and Implementation Services - ERP Functional Requirements.xlsx
5. Attachment D – RFP for ERP Software and Implementation Services – Staffing Forms.xlsx
6. Attachment E - Intent to Propose
7. Attachment F - Catawba County Data Security Agreement

6.2 PROPRIETARY INFORMATION

Trade secrets or proprietary information submitted by Proposer in connection with a procurement transaction shall not be subject to the public disclosure under the North Carolina Public Records Act pursuant to NCGS § 66-152(3). However, the Proposer must invoke the protection of this section prior to or upon submission of the data or other materials and must identify the data on other materials to be protected and state the reasons why protection is necessary. DO NOT mark every page as confidential. **Each individual page that is a trade secret or proprietary information must be labeled “Confidential” in the top right corner.** However, under no circumstances shall price information be designated as confidential.

6.3 EXECUTIVE SUMMARY FORMAT

This file should be limited to 20 pages describing the proposed solution beyond what is asked in each of the required attachments. The page limit does not apply to the provided Excel attachments.

The Executive Summary should include the following sections:

Executive summary

The bidder should provide a brief narrative, not to exceed two pages, describing the proposed solution. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel. The executive summary should not include cost quotations.

Application software

The bidder is required to provide a general description of the application program product and how it will meet the requirements of this RFP. As part of the proposal process, bidders will be required to submit significant technical details about the proposed solution. Any potential conflicts with the County's current technical environment must be noted in this section.

The bidder is required to provide a general description of the application program product and how it will meet the requirements of this RFP. This section may address the following items:

- Describe your overall proposed technology solution.
- Describe the product direction for the company, including time frames.
- Describe unique aspects of the bidder's solution in the marketplace.
- Describe components of the solution that are industry standards versus being proprietary to the bidder.

For all third-party products:

- List all third-party products proposed.
- The reason that this product is a third-party product versus being part of the software bidder's solution.
- The extent to which this third-party product is integrated with the bidder's solution.

General implementation approach

Provide a general overview of the implementation approach you plan to use for the County that includes addressing the following items:

- Provide an overall description of the bidder project management approach toward this type of engagement and projected timing for major phases.
- Describe key differentiators of the approach as it relates to implementing a solution on time, within budget, and with the ability to meet the needs of a diverse client like the County.
- Describe how you conclude on a preferred implementation phasing of software modules. What is your recommended approach for this implementation?
- Any unique tools, techniques, or methods that you use may be described in this section.
- Services/techniques related to organizational change management.

Vendors are encouraged to provide a sample project plan in their response. This will not count towards the page limit.

Integrations and interfaces

Provide a general overview of the integration/interface capabilities of your system. You may address the following items:

- Integration/interface methods available such as APIs, file transfers, etc.
- Specific recommendations for completing the integrations listed in the RFP.
- Partnerships with integration platform as a service or managed integration services

6.4 INSTRUCTIONS FOR COMPLETING REQUIRED ATTACHMENTS

Attachment	Response Standard
Attachment A – Bidder Questionnaire.xlsx	Complete all applicable tabs, including vendor background, references, compliance exceptions, integrations, migrations, and support-related information.
Attachment B – Pricing Workbook.xlsx	• Provide all one-time and recurring costs over the requested pricing horizon. • Costs shall be provided in U.S. Dollars. • Identify required vs. optional costs and the vendor/service provider receiving payment. • Include notes explaining any factors that may influence on-going subscription fees (e.g. user count, FTE count, etc.)
Attachment C – Requirements Workbook.xlsx	• Use the defined response codes only. • Provide module/application and explanatory comments where applicable, especially for modification, third-party, future, or unavailable responses. • If a response to a requirement indicates a third-party system is required, the actual system must be clearly named and identified. Pricing for all third-party systems must be included in the pricing workbook. • If a response to a requirement indicates a modification is required, the cost for modifications must be clearly identified and provided in the pricing workbook.
Attachment D – Staffing Workbook.xlsx	• Provide realistic Client and vendor/subcontractor staffing estimates by role and month. • Align staffing estimates with the proposed implementation plan and pricing assumptions. • Staffing is provided for evaluating the implementation approach and for County planning purposes. Even if a bidder is providing a fixed fee proposal, the response must include estimated staffing levels.

SECTION 7 – REQUIREMENTS

7.1 PROPOSER RESPONSIBILITY

The Proposer is responsible for verifying any and all information provided and to familiarize themselves with the work required prior to bidding. A plea of ignorance of the conditions that exist, or may hereafter exist, or difficulties that may be encountered in the execution of the work, as a result of failure to make necessary investigations and examinations, will not be accepted as an excuse for any failure, or omission on the part of the successful documents and to complete the work for the consideration set forth herein, or as a basis for any claim whatsoever.

7.2 COMPLIANCE WITH LAWS

All Proposers are expected to comply with all federal, state and local laws and regulations relative to the preparation and submission of proposals for insurance. All proposals that are submitted will be presumed to be in compliance with all applicable laws.

7.3 CONTROLLING LAW

Any contract resulting from this RFP will be governed and construed in accordance with the laws of the State of North Carolina. Venue for any adversarial proceeding is Catawba County.

7.4 INDEMNIFICATION

Any work to be performed by Proposer as a result of this RFP shall be performed entirely at Proposer's own risk. Proposer shall indemnify and save harmless the County, its commissioners, employees, agents and representatives from any and all liabilities and claims of every kind, including attorney's fees, to which County may be subjected on account of loss, destruction or damage to property or injury to or death of persons, including Proposer and persons employed by Proposer, arising out of or in connection with performance of the contract. The provisions of this paragraph shall not be applicable to loss or damage caused by the negligent act of omission of County or its employees.

7.5 TERMINATION

At a minimum, County may terminate the Agreement for the Proposer's uncured material breach by providing written notice. The Proposer shall have thirty (30) days from receipt to cure such breach to the reasonable satisfaction of the County.

7.6 PROPOSER'S LICENSE OR SUPPORT AGREEMENTS

The Proposer must include in its Proposal, its license and/or support agreements for review and evaluation. Terms offered for licensing and support of Proposers' proprietary assets will be considered. The terms and conditions of the Proposer's standard services, license, maintenance or other agreement(s) applicable to Services, Software and other Products acquired under this RFP may apply if approved by County and to the extent such terms and conditions are consistent with County's contracting policies and requirements, do not violate any laws, and do not materially change the terms and conditions of this RFP. In the event of any inconstancy, conflict or ambiguity among the terms and conditions of the County's Request for Proposals and the Proposer's response, the terms and conditions of the County's Request for Proposals shall control.

7.7 NON-APPROPRIATION CLAUSE

Payment to Proposer for services is expressly conditioned upon availability of funds, and upon the actual receipt of funds, from appropriated revenue sources. If funds are insufficient to meet expected performances hereunder due to non-appropriation or reduction of funds by the source, services to be provided hereunder may be adjusted by the parties, in writing, to conform with the funds which are actually available. If such adjustment is impractical or

would defeat the intent or purpose of this Agreement, same may be terminated accordingly without penalty.

7.8 INSURANCE COVERAGE

If Proposer is selected for contract award, a Certificate of Insurance must be provided showing coverages, with limits approved by County, for the following lines: commercial general liability, automobile liability, workers' compensation & employers' liability and cyber liability.

7.9 WARRANTIES

Catawba County will assume that any software company submitting a proposal in response to the RFP, warrants and guarantees that the products or services designed to be supplied by the company are, in fact, fully capable of performing the tasks designated by the RFP. The contract entered into between the County and the company will contain the warranty that any products supplied will be new and free from defects in design, materials and workmanship, and will be capable of the purpose for which the RFP was designed and published. No limitation or exception to this warranty provision will be acceptable to Catawba County. If the products or services are not capable of performing the task designated by the RFP, Proposer will assume the liability of providing services and programming at no extra cost to deliver the product promised in the Contract signed by the Software company.

7.10 SUBCONTRACTORS

The successful Proposer will be the primary software company and will perform the services using their own workforce. The Proposer shall not subcontract the project without the prior approval of the County. If the Proposer intends to subcontract any part of the Project, the subcontracted services and subcontractor information must be clearly identified in the submittal, including roles, resumes of key personnel and project references.

7.11 NON-DISCRIMINATION

Proposer, nor its employees will discriminate against any person based on race; religion; creed; color; sex; gender identity and expression; pregnancy; childbirth; breastfeeding; medical conditions related to pregnancy, childbirth, or breastfeeding; sexual orientation; marital status; age; national origin; ancestry; genetic information; disability; veteran status; low income status or any class protected by local, state, or federal law in the performance of the Agreement resulting from this RFP.

7.12 E-VERIFY

Proposer shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes. Further, if Proposer uses a subcontractor, Proposer shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes.

7.13 AUTHORIZED SIGNATURE

All proposals must be signed by persons who have the legal authority to bind the provider to the contract that is proposed.

SECTION 8 – ATTACHMENTS

Attachments A–D enumerated below are multi-tab Excel electronic response files and are incorporated into and made a part of this solicitation. Bidders shall complete and submit the applicable electronic response files as part of their bid response.

ATTACHMENT A: RFP for ERP Software and Implementation Services - Bidder Forms.docx

ATTACHMENT B: RFP for ERP Software and Implementation Services - Pricing Forms.xlsx

ATTACHMENT C: RFP for ERP Software and Implementation Services - ERP Functional Requirements.xlsx

ATTACHMENT D: RFP for ERP Software and Implementation Services – Staffing Forms.xlsx

ATTACHMENTS CONTINUE ON NEXT PAGE.

**ATTACHMENT E
INTENT TO PROPOSE
RFP NO: 27-1004**

This form should be e-mailed to TinaWright@catawbacountync.gov to ensure you receive all addenda issued for this RFP.

I, _____ a representative of _____

_____ confirm that we intend to submit

a bid for **RFP No: 27-1004 – Enterprise Resource Planning (ERP) Project:**

Company Name _____

Address _____

Contact Name _____

Phone (____) _____

E-mail _____

Date _____

ATTACHMENT F
CATAWBA COUNTY DATA SECURITY AGREEMENT

(The awarded Proposer will be required to sign Catawba County's Data Security Agreement)

Catawba County
Addendum – Data Security
Additional Terms and Conditions

This Data Security Addendum ("Addendum") is made this ____ day of _____, 2026 and supplements Catawba County service contracts and vendor contracts that include access to internal network operation and/or access to confidential information, including but not limited to access to network operations; confidential information protected under the Privacy Act, HIPAA, or other laws or regulations; and confidential information either through data information exchange or through direct data collection from employees.

Data Security

_____ agrees to implement administrative, physical, and technical safeguards that are commercially reasonable and appropriate to protect the confidentiality, integrity, and availability of the electronic data that it creates, receives, or transmits on behalf of Catawba County. Commercially reasonable and appropriate safeguards include but are not limited to:

- Secure physical environment,
- Secure network environment,
- Strong password protected environment,
- Up-to-date virus protection and automatic up date of the virus protection and definition files,
- Data encryption on any data stored or transported on mobile devices,
- Compliance with appropriate laws and regulations, i.e. HIPAA, PCI, HITECH and Red Flag Rules, and
- Use US Department of Defense cleaning and sanitizing standard for equipment disposal.

Chain of Trust

Service Provider must ensure that partner agreements are in place where any agent, including a subcontractor to whom it provides Catawba County's data, agrees to implement administrative, physical, and technical safeguards that are commercially reasonable and appropriate to protect Catawba County's data.

Transmission Security

Service Provider agrees that all transmissions or exchanges of system and application data with Catawba County and/or any other parties expressly designated by Catawba County shall take place via a secure means, e.g. HTTPS, SSH file transfer protocol, FTP/SSL, or FTP/TLS.

Data at Termination of Contract

Service Provider agrees to erase, destroy, or render unreadable all devices containing Catawba County's data that are required to be turned into a vendor for replacement, sold, or otherwise disposed of, including any equipment containing a hard drive. Service Provider further agrees that upon termination of this contract, it shall return Catawba County's data in a mutually agreeable format, then erase, destroy, and render unreadable all other data and certify in writing that these actions have been completed within thirty (30) days of the termination of this contract.

Permitted Uses and Disclosures

Service Provider may not use, share, sell, or otherwise dispense of any of Catawba County's data for any purpose other than as covered under the Agreement.

Reporting of Unauthorized Disclosures or Misuse of Data

Service Provider will promptly report to Catawba County any suspected or actual breach of security of which it becomes aware that affects Catawba County's data. Service Provider will also promptly report to Catawba County any use or disclosure of Catawba County's data other than has been allowed in the Agreement and/or Addendum. Service Provider will also promptly report to Catawba County any use or disclosure of Catawba County data other than has been provided in this Contract and/or Addendum. Where a breach or unauthorized release, as defined in NCGS §75-65 or in any other state or federal regulation is attributable to Service Provider, Service Provider shall pay for or promptly reimburse Catawba County for the full cost of remediation and any associated legal fees.

Cyber Liability Insurance Required

Service Provider must carry and maintain, throughout the period of the Agreement, at Service Provider's sole expense, cyber liability and data breach insurance at a level acceptable to Catawba County, but at a minimum with limits not less than \$1,000,000 per occurrence or claim, \$2,000,000 aggregate. Coverage must be sufficiently broad to respond to the duties and obligations undertaken by the Service Provider in this Agreement and shall include, but not be limited to, claims involving security breach, system failure, data recovery, business interruption, cyber extortion, social engineering, infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, and alteration of electronic information. The policy shall provide coverage for breach response costs, regulatory fines and penalties as well as credit monitoring expenses. A Certificate of Insurance ("COI") shall be furnished by Service Provider to Catawba County at the time of, or before execution of the agreement, and annually thereafter for any extended term. Such COI's shall require the insurer issuing the underlying policy to name Catawba County as an additional insured and provide Catawba County with a minimum of thirty (30) days notice prior to modification or cancellation of said policy. The maintenance of such insurance will not in any manner affect Service Provider's obligation to indemnify Catawba County. Service Provider agrees that such insurance shall be primary, regardless of any other insurance coverage which Catawba County may procure for its own benefit. Service Provider agrees to indemnify County if the insurance policy referenced in the COI does not contain, at a minimum, the coverage amounts listed on the COI.

Internal Practices

Upon reasonable notice, Service Provider will make its internal practices, policies, procedures, and documentation available during an on-site inspection no more than once per year if so required by Catawba County or at such a time that Catawba County may reasonably determine that the Service Provider has breached the Agreement or this Addendum. Failure by Catawba County to inspect does not relieve Service Provider of its responsibility to comply with this Addendum, nor does Catawba County's failure to require remediation constitute acceptance of such practice or a waiver of Catawba County's enforcement rights under the Agreement or this Addendum.

{Signatures on following page}

IN WITNESS WHEREOF, the parties have executed this Addendum on the day and year above first written.

CATAWBA COUNTY

SERVICE PROVIDER

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

END OF ATTACHMENTS