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ADDENDUM NO. 1

Issue Date: October 29, 2026

Request for Proposals – School Merger Facilitation and Strategic Advisory Services

RFP NO: 27-1006

To: All Potential Proposers

The Request for Proposals (RFP) is modified as set forth in this Addendum No. 1. The original RFP documents and any previously issued addenda remain in full force and effect, except as modified by this Addendum, which is hereby made part of the RFP. Proposer shall take this Addendum into consideration when preparing and submitting its Proposal. Catawba County is issuing this Addendum to provide RFP clarifications.

QUESTIONS/CLARIFICATIONS:

BUDGET, OBJECTIVES AND SCOPE

1. **Question:** What approved or anticipated budget range is available for this consulting engagement over its full term, including any post-merger support, separate from the overall merger budget?

Answer: *The budget requirements will be driven by the proposed approach to accomplishing the work scope; proposals will be evaluated in terms of reasonableness of cost given magnitude of effort and overarching project approach.*

2. **Question:** Is the primary objective to establish one functioning district while maintaining current services, or does the County also expect substantial redesign of structures, programs and operations?

Answer: *The primary objective is to establish one functioning district while maintaining current services.*

3. **Question:** Is the consultant expected to advise and coordinate implementation, or provide the personnel who carry out integration activities alongside district staff?

Answer: *The consultant is expected to advise and coordinate implementation.*

4. **Question:** What are the highest-priority outcomes and deliverables the consultant must achieve for the engagement to be considered successful?

Answer: *School attendance zone adjustment recommendations, pay scale integration across classification / compensation systems, and policy and procedure integration should be the initial priorities.*

5. **Question:** Which activities will remain district responsibilities or be handled through separate contracts rather than this consulting engagement?

Answer: *This question should be addressed in proposal responses.*

6. **Question:** Does the County expect a comprehensive implementation fee now, or would it consider an initial planning phase followed by separately authorized implementation support?

Answer: *The County is open to an initial planning phase followed by separately authorized implementation support.*

LEADERSHIP AND DELIVERY RESPONSIBILITIES

7. **Question:** Who will be the executive sponsor and day-to-day project lead, and to whom will the consultant report?

Answer: *The Chair of the Catawba Valley Board of Education will be the executive sponsor and day-to-day project lead, and the consultant will report to this person.*

8. **Question:** How will decisions be divided among the County, the existing districts and the new board, particularly when their priorities or proposed approaches differ?

Answer: *While achieving consensus wherever possible is the goal, the Catawba Valley Board of Education has final decision-making authority.*

9. **Question:** When will the new superintendent and leadership team be available to make integration decisions, and who will exercise that authority in the meantime?

Answer: *This question should be addressed in proposal responses. The Catawba Valley Board of Education will determine who exercises authority in these decisions prior to the superintendent and leadership team being in place.*

10. **Question:** Will each district assign department leads with dedicated project time to carry out integration work, or should the consultant plan to provide additional delivery capacity?

Answer: *While each district will likely assign appropriate personnel to the integration project, it would be prudent for the consultant to plan for a blended*

approach to meeting project capacity needs, particularly in areas where it is anticipated there will be a need for specialized expertise.

11. **Question:** What school-administration, legal, finance and technology expertise will the County or districts provide, and which specialists must be included in the consultant's team?

Answer: *The consultant will have full access to district and County staff, which includes expertise across a broad range of functional disciplines. If there are specialties or critical areas of niche expertise anticipated to be needed beyond what local districts typically have available, those specialists should be included in the consultant's team.*

12. **Question:** What authority will the consultant have to coordinate district staff and vendors, and who will resolve missed commitments or delayed decisions?

Answer: *Upon approval and concurrence of the Catawba Valley Board of Education, the consultant will have full authority to coordinate district staff and vendors, including escalating missed commitments or delayed decisions. The Chair of the Catawba Valley Board of Education will be responsible for assisting in escalating and remedying issues, as appropriate.*

STARTING POINT AND TIMELINE

13. **Question:** What merger planning and implementation work has already been completed or assigned to others, and what should the consultant treat as its starting point?

Answer: *Beyond the information laid out in the proposed merger plan, no additional significant merger planning and implementation work has been completed or is currently assigned to others.*

14. **Question:** Are prior studies and financial assumptions accepted as the basis for implementation, or must the consultant independently validate merger costs, savings and operational impacts?

Answer: *The consultant is not expected to independently validate merger savings and operational impacts. There is an expectation that as the project progresses, the consultant will develop realistic merger implementation cost estimates based on specific plans, priorities, and initiatives.*

15. **Question:** Which major integration decisions are already settled, and which will the consultant be expected to evaluate and recommend?

Answer: *The governance structure of the Catawba Valley Board of Education has been established through the merger plan, as has the effective date of the single merged system.*

16. **Question:** What start date, major milestones and contract end date should bidders use, including the expected period of post-merger support?

Answer: *The contractor can assume a start date of early January 2027. The other details are expected to be addressed through the proposals, based on what the contractor anticipates as the most persistent issues or aspects of the merger.*

17. **Question:** Which services and systems must be fully unified when the merger takes effect, and which may transition in stages afterward?

Answer: *Financial systems and employee and student information management systems must be fully unified when the merger takes effect.*

18. **Question:** What unresolved approvals or known dependencies could change the schedule, and how would delays affect the consultant's required staffing and engagement period?

Answer: *The timing of the State Board of Education decision authorizing the merger is a known dependency. Any delays in approval, unless accompanied by an adjustment to the proposed merger effective date, would reduce the total amount of time available for required activities.*

SYSTEMS INTEGRATION

19. **Question:** At a high level, which payroll, HR and financial systems does each district use, and do shared products operate as separate district setups or a common system?

Answer: *This information is expected to be a deliverable brought forward by the selected consultant.*

20. **Question:** Beyond payroll, HR and finance, which major systems, including student information, are expected to be combined, replaced or left unchanged?

Answer: *This information is expected to be a deliverable brought forward by the selected consultant.*

21. **Question:** Have the systems for the merged district been selected, or must the consultant lead requirements gathering, options evaluation and vendor selection?

Answer: *The systems have not been selected.*

22. **Question:** Will district IT staff and software vendors perform the technical implementation, or must the consultant supply specialists to configure systems and connect them?

Answer: *It is expected that district teams and vendors will perform this work.*

23. **Question:** Will district teams and vendors prepare and transfer employee, student and financial records, with consultant coordination, or must the consultant perform that work?

Answer: *It is expected that district teams and vendors will perform this work.*

24. **Question:** Does technology scope include consolidating email, user access and IT infrastructure, or only the business applications needed to operate the merged district?

Answer: *The scope places priority on consolidation of the business applications needed to operate the merged district.*

25. **Question:** Who will develop and execute system and payroll testing, and is the consultant expected to oversee validation or perform testing and resolve implementation issues?

Answer: *This question should be addressed in proposal responses.*

ORGANIZATION, EMPLOYEES AND POLICIES

26. **Question:** Is organizational-design work limited to the central office, or must it also address school-based staffing, reporting relationships and service-delivery structures?

Answer: *Organizational design work is limited to central office staff.*

27. **Question:** Will the consultant recommend employee-transition arrangements only, or also conduct individual assessments, placements and related personnel processes?

Answer: *Optimally, the consultant will put in place the integrated classification framework to guide employee transitions and will support newly established district leadership in finalizing employee transition plans and associated activities.*

28. **Question:** Does the HR scope require harmonizing existing job descriptions, pay and benefits, or developing new structures and policies for the merged workforce?

Answer: *This question should be addressed in proposal responses.*

29. **Question:** What employee protections or approved commitments must guide staffing and compensation decisions, and who will provide authoritative guidance on applying them?

Answer: *The proposed merger plan outlines an approach where no existing employees will lose their jobs as a result of the merger, although they may be reassigned. The merger plan also places a high priority on maintaining existing special programs for two years following the merger. Authoritative guidance will be provided by the Catawba Valley Board of Education.*

30. **Question:** Is the consultant expected to identify policy differences and recommend alignment, or draft the complete employee handbook, board policies and operating procedures?

Answer: *The consultant is expected to identify policy differences and recommend alignment.*

31. **Question:** Who will lead the transition to unified payroll and benefits administration, and where should consultant responsibility end relative to district HR, finance and existing providers?

Answer: *This question should be addressed in proposal responses.*

FINANCE AND SCHOOL OPERATIONS

32. **Question:** Is the consultant expected to prepare the merged district's budget and financial models, or coordinate and review work prepared by district finance teams?

Answer: *The consultant is expected to establish a merged financial system, including general ledger structure and chart of accounts. It is anticipated the newly established district leadership staff will oversee budget development and implementation.*

33. **Question:** Who will lead consolidation of financial records, funding arrangements, contracts and assets, and what execution responsibilities should be included in the consultant's scope?

Answer: *The consultant is expected to develop a plan to lead these activities.*

34. **Question:** Are school closures, attendance-boundary changes or facility relocations included in this engagement, or will they be managed through separate projects?

Answer: *There are no anticipated school closures or facility relocations expected through this merger. It is expected that attendance boundary changes will be planned for through this process, either directly or as a separate project.*

35. **Question:** For transportation, food service and facilities, should the consultant coordinate district-led transition plans or develop and implement new operating models?

Answer: *The consultant should coordinate district-led transition plans.*

36. **Question:** Does the consultant's role include redesigning educational programs and student services, or coordinating continuity while district education leaders make and implement those decisions?

Answer: *The consultant's role should focus on coordinating continuity while district leaders make future programmatic redesign decisions.*

37. **Question:** Will the County and districts retain responsibility for legal actions and state approvals, with the consultant tracking dependencies, or is a broader role expected?

Answer: *The County and districts will retain responsibility for legal actions and state approvals.*

ENGAGEMENT, COMMUNICATIONS AND TRAINING

38. **Question:** What level of board, staff and community engagement is expected, including the approximate frequency of meetings the consultant must lead or support?

Answer: *This question should be addressed in proposal responses.*

39. **Question:** Is the consultant responsible for communications planning and facilitation, or also producing ongoing content, managing public inquiries and supporting the new district's identity?

Answer: *The consultant is responsible for communications planning and facilitation.*

40. **Question:** Will the consultant lead organization-wide change management and leadership alignment, or support an established district-led program?

Answer: *The consultant is expected to include change management and leadership alignment activities in individual plan components.*

41. **Question:** Is training expected to be delivered primarily by district staff and system vendors, with consultant coordination, or must the consultant develop and deliver the training?

Answer: *The consultant is not expected to develop and deliver the training but is expected to include development of a training plan in project planning activities.*

COMPLETION AND SCOPE MANAGEMENT

42. **Question:** Who will approve the integrated transition plan, accept consultant deliverables and decide whether the districts are ready to begin operating as one organization?

Answer: *The Catawba Valley Board of Education holds ultimate decision-making authority.*

43. **Question:** What consultant support is expected at the first combined payroll and school opening, and does this involve issue coordination or direct operational support?

Answer: *It is expected that post-merger support will consist of any remaining issue coordination. As such, it is challenging to forecast the exact nature of that support at this point in time.*

44. **Question:** What outcomes will mark the end of post-merger support and the handover of all continuing responsibilities to the merged district?

Answer: *The end of post-merger support will be marked by the diminishing frequency of merger-related issues requiring coordination and resolution. The hand-off to the merged district will likely be marked by all of the contracted project deliverables having been accepted by the Catawba Valley Board of Education.*

45. **Question:** Where responsibilities or major decisions remain unresolved at proposal time, may bidders state scope assumptions and agree how material changes will affect fees and schedule?

Answer: *Yes, this approach is acceptable.*

46. **Question:** The SBE timeline indicates that it will not vote whether to approve the merger until 2-3DEC at the earliest. If the merger is denied by the SBE, should we assume this project will not proceed?

Answer: *If the merger is denied by the SBOE, this project will not proceed on the advertised timeline.*

47. **Question:** Can you provide a copy of what each school district submitted by 05OCT to the SBE regarding the proposed merger?

Answer: *Yes.*

48. **Question:** The County's Full Merger Plan notes that there will be no staffing reductions for 2 years after July 1, 2028, yet the RFP calls for assistance in developing "staffing considerations" and to assist in a variety of HR activities. Does this mean that the selected firm for this work will NOT be making recommendations regarding optimal staffing levels within the merged district?

Answer: *The selected firm will be developing optimal central office staffing and will develop integrated pay grades and classification and compensation systems for school-based staff. Optimally, the consultant will support newly established district leadership staff in making those final decisions.*

49. **Question:** Could the County confirm the contract end date?

Answer: *As referenced in 2.7 Proposal Contents of the RFP, a detailed schedule is expected to be addressed in the proposal submission.*

50. **Question:** Is the post-merger stabilization (section 3.14) part of the base contract or an optional extension? For how long after the merger on July 1, 2028 is the county seeking post-merger stabilization support?

Answer: *To the extent that deliverables from initial contract work are still outstanding after the effective merger date of July 1, 2028, post-merger stabilization will focus on completing deliverables for which commitments were previously made. If additional tasks or deliverables emerge through the merger process, the County would be open to addressing those items through an optional extension.*

51. **Question:** Should each of the three response packets (1 original and 2 copies) be in tabbed binders? Or is the use of "tab" just to designate separators of sections rather than requiring physical tab dividers?

Answer: *The intent of this requirement is for each section to be clearly separated and identified for ease of review. Proposers may use their preferred method of organizing the sections, whether through designated section separators or physical tab dividers.*

This Addendum consists of 9 pages in total.

END OF ADDENDUM