



catawba county

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ADDENDUM NO. 1

Issue Date: October 3, 2025

Request for Proposals – Enterprise Resource Planning (ERP)

Software Consulting

RFP NO: 26-1003

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 revisions and clarifications.

RFP Amendment:

1. Page 6, Tab 3, List Marker 3:

Delete Paragraph in its entirety and insert the following in its place:

➤ **Previous and Current Contracts:** Provide a list of completed contracts held with public entities, for services similar to those requested in this RFP, within the last seven (7) years. In addition, provide a list of current contracts, including award date and date for anticipated completion for similar services.

Questions/Clarifications:

1. **Question:** Will the County be open to a hybrid remote/onsite approach with some key tasks completed onsite and others completed remotely?

Answer: Yes.

2. **Question:** Does the County have a preference for the ratio of on-site versus remote work?

Answer: The number of on-site visits should be adequate to support the understanding of the County's needs and expectations throughout the term

of the contract. In your proposal, please outline your standard approach to balancing hybrid versus on-site work.

3. **Question:** Can the County provide the weighting of evaluation criteria (e.g., experience, methodology, cost, references) that will be used in the scoring process?

Answer: All of the evaluation criteria outlined in Section 4 – Proposal Evaluation and Award are considered equally important; therefore, there is no evaluation scoring matrix to provide.

4. **Question:** Will proposals from firms that have ERP consulting experience outside of the public sector be considered equally, or is direct public-sector ERP experience mandatory for award?

Answer: While the County will accept responses from all firms, a firm with proven experience and demonstrated success with similar solutions for other public entities could be viewed as more suitable for this project.

5. **Question:** The RFP requests five (5) references. If a firm cannot provide five public-sector ERP clients, will other enterprise technology consulting or system migration references be accepted?

Answer: Yes, the County will accept references outside public-sector ERP clients.

6. **Question:** What is the budget range allocated for ERP consulting services?

Answer: A budget for consulting services has not yet been determined. Project funding is approved, but consulting funds are not yet allocated.

7. **Question:** Does the County have the current business processes documented, or will documentation need to be created as part of this engagement?

Answer: The County has some mapping documents of a limited number of processes; however, this is not in a consolidated document. Documentation of business processes needs to be created as part of the engagement to determine minimum requirements for the RFP for ERP software.

8. **Question:** The introduction section requests consulting firms with business process mapping experience. Can the County confirm if business process mapping will be a deliverable during the Gap Analysis / Needs Assessment phase?

Answer: Yes.

9. **Question:** Does the County have any future state requirements or process expectations already documented, or will the consulting team be

expected to facilitate and document the future state design as part of this engagement?

Answer: The County has a partial list of future state requirements based on desired enhancements/business process improvements not available in the current system.

10. **Question:** Will County personnel be available for planning and requirements gathering/definition between December 1, 2025, and December 19, 2025, or should the consulting team anticipate project activities beginning after the holiday period?

Answer: County personnel will be available for a kickoff meeting during this time period; however, the consulting team should plan for deliverable work to commence in January 2026.

11. **Question:** Is there any period during the year when the County enforces a freeze on technology changes or system modifications that would affect the ERP project schedule?

Answer: Nothing that should affect the ERP project schedule.

12. **Question:** Does the County currently utilize project management and/or visual collaboration tools (e.g., LucidChart, [Monday.com](https://monday.com), Mural, Smartsheet, etc.) that the consulting team will be expected to adopt, or should the vendor provide its own toolset?

Answer: Vendor will need to provide its own toolset.

13. **Question:** Is there a page limit to the RFP response?

Answer: Yes, responses should not exceed 30 pages.

14. **Question:** Given the wide range of services that can be provided during the optional implementation management phase, does the County want pricing included for that phase?

Answer: While it is not a requirement of the RFP, providing those optional costs would be helpful.

15. **Question:** Is the County open to consulting firms proposing optional services that are not requested but could potentially benefit the County?

Answer: Yes, the County is open to consulting firms proposing optional services. Please price those separately under Tab 5: Cost Proposal.

16. **Question:** Does the County expect any other systems to be replaced in addition to PeopleSoft? If yes, can you please share the name of the system and functional scope (E.g. timekeeping system, asset management system, etc.)?

Answer: No.

17. **Question:** Does the County have any deadlines or time constraints for the project or individual phases?

Answer: Within 120 days of consulting contract award, vendor needs to provide a reasonable estimated cost of a replacement ERP based on the preliminary evaluation of County needs and vendor's experience with similar projects. Ideally, the preparation of the request for proposals for the ERP software, product demonstrations, and selection of ERP vendor should be completed no later than January 2027.

18. **Question:** Does the County want process flow diagrams included as part of the needs assessment/gap analysis?

Answer: Yes.

19. **Question:** The action plan is listed after the RFP development phase. Does the County want the action plan to consider the vendor responses to the RFP? Or does the County prefer to have the action plan prior to the release of the RFP?

Answer: The action plan should consider vendor responses to the RFP.

20. **Question:** Does the County want the consultant to attend the software demonstrations or just provide planning, agenda/script development, and collection of feedback/debriefs?

Answer: Attendance at software demonstrations would be beneficial.

21. **Question:** What timeline is the county looking at for this awarded project?

Answer: The County anticipates awarding the consulting services contract in December 2025, ERP software vendor chosen prior to January 2027, and ERP software contract established by June 30, 2027.

22. **Question:** Can prospective vendors responding to this RFP also be the software vendor for the eventual ERP system?

Answer: The awarded vendor for ERP Software Consulting is prohibited from bidding the ERP system, as this is a significant conflict of interest.

23. **Question:** What current manual processes need to be replicated in the new ERP?

Answer: This will need to be determined through the business process mapping services as referenced in the RFP.

24. **Question:** Is the county looking for an off-the-shelf ERP solution or a custom software solution?

Answer: The County is looking for a cloud-based system with some level of customization within the product; however, the County is not looking for a fully customizable solution.

25. **Question:** Are there any other deliverables the county expects outside of the ones described in this RFP?

Answer: No.

26. **Question:** Will configuration, development, and implementation be part of the scope of this project?

Answer: No. Implementation management is an optional service described in Section 3.7 of the RFP.

27. **Question:** Will only one (1) vendor be awarded this project or does the county anticipate multiple vendors be awarded this?

Answer: The County will award one contract as a result of this Request for Proposals process.

28. **Question:** How many day-to-day users of the current PeopleSoft system are there currently?

Answer: The County has approximately 1,200 employees; however, only an estimated 50-75 users access the system daily.

29. **Question:** What integrations will be in scope for the new ERP system?

Answer: The County is looking for an ERP system with robust APIs to interface with the County's tax software, permitting software, recruitment, onboarding and risk management software, credit card processing vendors, and banking services.

30. **Question:** Does the county anticipate a full-sunset of PeopleSoft once the new system is implemented or a phased approach?

Answer: Phased approach.

31. **Question:** Does the County have an internal project manager for the implementation phase, or is it anticipated that the selected vendor will act on the County's behalf as its project manager?

Answer: The County will have a specified project manager, a single point of contact, for this project.

This Addendum consists of 5 pages in total.

END OF ADDENDUM