

REQUEST FOR PROPOSALS

**ENTERPRISE RESOURCE PLANNING (ERP)
SOFTWARE CONSULTING**

RFP NO: 26-1003



catawba county

MAKING. LIVING. BETTER.

Date of Issue: September 3, 2025

Proposals Due: November 3, 2025

Time: 3:00 PM ET

Issued for:

**Catawba County Finance Department
25 Government Drive
Newton, North Carolina 28658**

Issued by:

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

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SECTION 1 – INTRODUCTION

1.1 INTRODUCTION

Pursuant to N.C.G.S § 143-129.8 and N.C.G.S § 143-135.9, Catawba County (hereinafter “County”) is soliciting Request for Proposals (hereinafter “RFP’s”) from qualified consulting firms (hereinafter “Proposer”) interested in providing Enterprise Resource Planning (ERP) consulting services for project planning and development of a Request for Proposal for such project. The County is requesting proposals from qualified firms with proven experience to conduct needs assessment for an a ERP replacement, provide process mapping, draft an RFP for ERP replacement, develop an implementation plan, assist in evaluating, selecting, and negotiating a contract with a preferred system vendor, and facilitate client-side project management during implementation of the new ERP in full accordance with the requirements, terms, and conditions contained in this Request for Proposal.

1.2 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.

The County has been utilizing Oracle PeopleSoft for 25+ years. The current versions include Financials and Supply Chain Management (FSCM 9.2) and Human Capital Management (HCM 9.2). The County intends to evaluate and identify a software replacement to improve and enhance its current financial transactions and business processes, human resources management, budgeting and performance measurements.

1.3 OBJECTIVE

The objectives for this project are to:

- Reduce manual processes and increase productivity.
- Reduce paper and paper-oriented processes.
- Improve integration between applications and other systems.
- Take advantage of newer technology.
- Ensure business requirements and enhanced workflows meet County expectations and create efficiencies.

The County is looking for the best overall solution to meet its current and future needs. It is understood that there are no perfect solutions and that vendors may vary in their capability to meet the County’s overall system needs.

SECTION 2 – PROPOSAL INFORMATION

2.1 GENERAL INFORMATION

This RFP is intended to provide Proposers with a common, uniform set of instructions to assist 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 the best solution for the County. 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 complete 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.

2.2 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	September 3, 2025
Submit Written Questions	Proposer	September 24, 2025 by 5:00 PM
Provide Responses to Questions	County	October 3, 2025 by 5:00 PM
Submit Proposals	Proposer	November 3, 2025 by 3:00 PM
Contract Award	County	November 17, 2025
Contract Effective Date	County	December 1, 2025

2.3 PROPOSAL QUESTIONS

Upon review of the RFP documents, Proposer 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 #: 26-1003 – 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.

2.4 PROPOSAL SUBMITTAL

Proposals, subject to the conditions made a part hereof, will be received at the address indicated in the table below, no later than **3:00 PM on November 3, 2025**. Each envelope should be clearly labeled with: RFP 26-1003 - Enterprise Resource Planning Software Consulting.

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: 26-1003 Catawba County Government Center Attn: Purchasing Department Post Office Box 389 Newton, North Carolina 28658	RFP No: 26-1003 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. 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 with **one (1) original, two (2) copies, and one (1) electronic copy on flash drive.** 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 B – 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 one hundred twenty (120) days after Proposal due date. Proposals received will remain confidential until a contract is awarded. No public bid opening will be held for this solicitation.

2.5 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 may result in rejection of a proposal.

2.6 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 or 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.

2.7 PROPOSAL CONTENTS

Proposers must carefully read the information requested in this “Proposal Contents” section and submit a complete proposal responding to each request for information. In order to evaluate responses efficiently and equitably, responses must be tabbed as identified below. Failure to submit information requested may render your proposal non-responsive

Tab 1: Executive Summary

- Provide an executive summary of the firm's proposal. The summary should highlight aspects of the proposal which make it superior or unique in addressing the needs and specifications of Catawba County.

Tab 2: Introduction: Company Information

- Provide a concise description of your company, including origin, year established, background, current size, type of company (individual, partnership, corporation, etc.) and list the names of all partners, principals, etc.
- Business name and address, including telephone, email address, and website address. Include any former company name(s) and year(s) established, if applicable.
- The name, title, address, and telephone number of the company's authorized negotiator. The person identified must be empowered to make binding commitments for the company.

Tab 3: Experience and Operations Summary

- **Understanding:** Clearly state your understanding of the consulting services requested in this RFP and your ability to meet the specifications, including capabilities, features, and limitations, as described herein.
- **Experience:** Describe the Proposer's experience in areas directly related to the consulting services requested in this RFP.
- **Previous and Current Contracts:** Provide a list of completed contracts held with public entities within the last ten (10) years. In addition, provide a list of current contracts, including award date and date for anticipated completion for similar services.
- Provide a detailed summary of any regulatory sanctions, license agency sanctions, litigation, claim(s), contract dispute(s) filed by or against the Proposer in the past five (5) years that are related to the services that the Proposer provides in the regular course of business. If none, please state that.

Tab 4: Project Management

- **Key Personnel of Proposer:** Proposer must provide a Project Team Organization and Staffing plan, including contact information and resumes for key personnel.
- **Point of Contact:** All project management and coordination on behalf of the County shall be through a single point of contact designated as the County Project Manager. Proposer shall also designate a Project Manager who will provide a single point of contact for management and coordination of the Proposer's work. Provide that information with your Key Personnel of Proposer information.
- **Approach to the Scope of Work:** Describe the proposed approach and methodology to performing the consulting services requested in this RFP.
- **Project Implementation Plan.** Proposer must provide a detailed schedule and associated Work Breakdown Structure (WBS) that includes phases, activities, tasks, milestones, deliverables, and resource management.
- Indicate capacity to successfully manage the Project.

Tab 5: Cost Proposal

- Provide a detailed itemization for all costs associated with the phases referenced in Proposer's Project Implementation Plan.
- Payment Terms: If progress payments are to be made, provide proposed progress payment terms.

Tab 6: Attachments

- Attachment A – Reference Disclosure Form
- Attachment B – Intent to Propose

SECTION 3 – SCOPE OF DELIVERABLES
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3.1 PROJECT MANAGEMENT

Facilitate identification of all project stakeholders; formalize a consultant communication plan; develop a project plan including timelines; facilitate project meetings; track all decisions; and track all issues with proposed actions.

Deliverable:

Project documents necessary to support a project of this size – including but not limited to project plan including timelines, communication plan, executive status reports, etc.

3.2 NEEDS ASSESSMENT / GAP ANALYSIS

In consideration of the County's goals and objectives, review, evaluate, and document existing systems; and determine and document the functional requirements necessary to meet the business needs of County departments. The Consultant, in collaboration with the County's function experts, will identify business process enhancements within the current systems that can be enhanced with a new ERP software solution, and propose opportunities for improved system design and efficiency.

Deliverable:

Needs Assessment/Gap Analysis report which should include current business practices and areas in which current needs are not being met by the current ERP solution. Identify assumptions and constraints that impact the outcome/success of the project.

3.3 RFP DEVELOPMENT

Develop an RFP based on the results of the Needs Assessment and Gap Analysis. Prepare an RFP to be issued by the County for new ERP software and implementation services. The RFP shall include a comprehensive set of ERP system requirements and specifications that will adequately replace existing ERP functionality and meet future County needs.

Deliverable:

Completed RFP for new ERP software and implementation.

3.4 DEVELOP AN ACTION PLAN TO IMPLEMENT ERP SOLUTION

Complete a comprehensive action plan to implement ERP solutions, including prioritization of solution requirements, suggested time frames for implementing the solution, necessary County staff resources, and allocation of time.

Deliverable:

Detailed action plan report related to the implementation of the ERP solutions and the phases of each. The action plan will clearly detail County resources needed to implement the solutions, including assessment of staff's current workloads in consideration of the workload demands associated with an ERP implementation, and identification of areas in which outside temporary help could be utilized.

3.5 EVALUATION AND SELECTION OF VENDOR

Guide the County through the RFP selection process, including coordinating software demonstrations and on-site visits. Assist with the identification of potential risks and issues to ensure the County makes a quality selection decision, which achieves the County's ERP requirements.

Deliverable:

Written analysis of vendor proposals and recommendations of the vendor that best meets the County's objectives.

3.6 CONTRACT NEGOTIATIONS

Once the software vendor has been recommended, the Consultant will be required to assist County staff in negotiating a contract.

Deliverable:

Review of proposals and assistance with negotiation of the contract.

3.7 IMPLEMENTATION MANAGEMENT (OPTIONAL)

Guide the County through the implementation of the selected software and assist with the identification and assessment of process changes necessary for a successful ERP software roll-out, including monitoring training; monitoring vendor compliance to negotiated contract; providing guidance in conducting user acceptance testing; and authorizing system acceptance for project closeout; assist with ensuring proper configuration of data, controls, permissions and workflows; assist with the development of standard operating procedures for County end-users; and act as a support liaison between County and vendor during Go-Live period.

Deliverable:

Consulting and project management services during the implementation and Go-Live phases for potential ERP solution.

SECTION 4 – PROPOSAL EVALUATION AND AWARD

4.1 PROPOSAL EVALUATION PROCESS

The County shall evaluate all Proposer responses to confirm they meet the specifications and requirements of the RFP. The evaluation of proposals will be based on:

- a) Completeness and quality of proposal;
- b) Work plan that demonstrates a thorough understanding of the consulting services offered;
- c) Proposer's ability to provide a solution that conforms to the specifications included in the RFP;
- d) Experience and qualifications of the Proposer;

- e) Cost competitiveness; and
- f) Past performance and demonstrated success with similar solutions for other public entities.

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.

If necessary, after the evaluation process, the County reserves the right to shortlist Proposer(s) and request that the Proposer(s) conduct a presentation and be interviewed by the selection committee.

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.

4.2 METHOD OF AWARD

In accordance with N.C.G.S. § 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.

SECTION 5 – REQUIREMENTS

5.1 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.

5.2 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.

5.3 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.

5.4 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.

5.5 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.

5.6 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.

5.7 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, cyber liability, workers' compensation & employers' liability.

5.8 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.

5.9 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.

ATTACHMENTS BEGIN ON NEXT PAGE

SECTION 6 – ATTACHMENTS

ATTACHMENT A REFERENCE DISCLOSURE FORM

Proposer shall provide information regarding experience in work similar to this scope of work by listing FIVE (5) RECENT CLIENTS, ONLY ONE OF WHICH MAY BE A CATAWBA COUNTY GOVERNMENT LISTING. References should be clients of a similar scale as the services requested in this RFP.

1. COMPANY NAME: _____
PERSON TO CONTACT: _____
TELEPHONE NUMBER: _____
EMAIL ADDRESS: _____
PROJECT SCOPE: _____
SERVICE DATES:
BEGINNING _____ END _____

2. COMPANY NAME: _____
PERSON TO CONTACT: _____
TELEPHONE NUMBER: _____
EMAIL ADDRESS: _____
PROJECT SCOPE: _____
SERVICE DATES:
BEGINNING _____ END _____

3. COMPANY NAME: _____
PERSON TO CONTACT: _____
TELEPHONE NUMBER: _____
EMAIL ADDRESS: _____
PROJECT SCOPE: _____
SERVICE DATES:
BEGINNING _____ END _____

4. COMPANY NAME: _____
PERSON TO CONTACT: _____
TELEPHONE NUMBER: _____
EMAIL ADDRESS: _____
PROJECT SCOPE: _____
SERVICE DATES:
BEGINNING _____ END _____

5. COMPANY NAME: _____
PERSON TO CONTACT: _____
TELEPHONE NUMBER: _____
EMAIL ADDRESS: _____
PROJECT SCOPE: _____
SERVICE DATES:
BEGINNING _____ END _____

**ATTACHMENT B
INTENT TO PROPOSE
RFP NO: 26-1003**

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: 26-1003 – Enterprise Resource Planning (ERP) Software Consulting:**

Company Name _____

Address _____

Contact Name _____

Phone (____) _____

E-mail _____

Date _____