



Request for Information No. 2023-029 Water Utility Customer Information and Billing System

Due Date: January 10, 2023
Time: 2:00PM EST
Receipt Location: Union County Government Center
Procurement Department
500 N. Main Street, Suite 709
Monroe, NC 28112
(Note: Follow the submittal instructions listed in this document to electronically upload a proposal package)

Procurement Representative

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1 INTENT OF RFI

Union County invites all interested parties with utility software experience to submit a written response to this Request for Information (RFI). A company does not need to respond to the RFI to be eligible to respond to any future solicitations. The future solicitation will be open to all potential vendors.

This RFI is being issued strictly for the purpose of gaining knowledge about current industry information regarding a utility software solution and should not be construed as an intent, commitment, or promise to acquire goods, services, supplies or solutions offered. No contract will result from any response to this RFI. Any future procurement by the County will be the subject of a separate process and subject to final budget appropriations.

2 RFI SUBMITTAL DETAILS

2.1 RFI SUBMISSION DEADLINE

All RFI submissions must electronically be received by the Union County Procurement Department no later than **2:00 PM EST on January 10, 2023** per the instructions below. Any submittals received after this date and time shall be rejected without exception.

2.2 RFI SUBMISSION REQUIREMENTS

The RFI submission responses **must be submitted electronically** using the following link: <https://portal.unioncountync.gov/Forms/procurementsubmit>. Select the Solicitation drop down arrow and choose this RFI from the list. Complete the form, upload your RFI submission response package, and select submit. An email will be sent to the address listed on the form as your confirmation of receipt.

The RFI submission response package should be signed by an authorized representative from the company. Instructions for preparing RFI submission package is provided herein.

Paper submissions will not be accepted.

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

2.3 RFI QUESTIONS

RFI questions will be due on or before **December 28, 2022 at 5:00 PM EST**. The primary purpose is to provide participating respondents with the opportunity to ask questions, in writing, related to the RFI.

Submit questions by e-mail to Corey Brooks at Corey.Brooks@unioncountync.gov by the deadline shown above. **The email subject line should identify the RFI number and project title.** All questions and answers may be posted as addenda on www.unioncountync.gov.



2.4 COMMUNICATION

All communications, any modifications, clarifications, amendments, questions, responses or any other matters related to this RFI must be made through the Procurement Contact noted on the cover of this RFI. If applicable, an addendum will be issued to answer questions.

3 PURPOSE

3.1 INTRODUCTION

Union County, NC (“County”), through Union County Water is issuing this Request for Information (RFI) to gather current market information for a utility software solution to emphasize real-time data collection, analysis, and visualization to support, inform, and improve business decisions across the organization.

The County (estimated population 242,657) is located in the central, southern piedmont. The County provides its residents with a full array of services that include public safety, water/wastewater utilities and sanitation, human services, cultural and recreational activities, and general government administration.

4 OVERVIEW OF PROJECT OBJECTIVE

The purpose of this RFI is for Union County’s Water Department to acquire information to determine what utility customer and billing information systems software solutions are available that will meet the needs of Union County as described in this document.


The objectives of this RFI are to:

- Gather information on the current utility software solution industry, including past performance, compatibility, configuration, design and implementation.
- Gather feedback and comments on the market standard and various requirements.
- Use the RFI feedback to modify the draft Technical Specifications and Terms and Conditions, wherever appropriate, to attract qualified vendors who can respond to a competitive solicitation.

4.1 CURRENT SOFTWARE ENVIRONMENT

Union County Water (UCW) employs a unified information management strategy that supports all operations and management. Our strategy will emphasize real-time data collection, analysis, and visualization to support, inform, and improve business decisions across the organization. UCW has a focus on people, technology, process, and strategy components to balance investments, trade-offs, and performance issues.

Union County Water currently employs a unified and integrated software approach. Our current utility software solution (Harris NorthStar v6.6) was implemented approximately 20 years ago; it stores and manages approximately 60,000 active customer accounts. It is an on-prem solution using a SQL database. The system also uses a Cognos reporting tool. A third-party customer portal solution (WaterSmart) and a separate payment portal (Paymentus) integrates with the primary utility software. We are also currently



implementing AMI (Sensus) for meter reading to replace our legacy AMR program. A separate Work and Maintenance Management System (Lucity) handles service requests (integrated with current CIS) and work order management. A replacement of the WMMS is not within the scope of future work or is necessary to include in RFI submittals, and an integration with this system will be required.

Union County utilizes MUNIS (by Tyler Works) for fiscal management. A Customer Information System must be able to export to or integrate with MUNIS with regard to summary financial data.

UCW welcomes both on-prem and cloud-based solutions. UCW requires SQL for database, with open access to the database for reporting, integrations, and unified data management. APIs are also used and preferred.

5 INFORMATION REQUESTED

The County seeks information from respondents to assist in establishing a utility software solution that at a minimum will:

- Provide state of the art utility software solution system information to meet the needs of Union County.
- Streamline and standardize processes;
- Reduce manual processes;
- Improve or upgrade reporting tools and data sharing;

6 SUBMITTAL REQUIREMENTS

6.1 RFI PROPOSAL FORMAT

Along with providing information requested in other sections of this RFI, the County is asking all Respondents to submit a response containing the information listed below.

The proposal should be organized and identified by section as follows:

- **Tab A** – Cover Letter
- **Tab B** – Questions Regarding Utility Software Solution
- **Tab C** – Cost Information
- **Tab D** – Required Forms

TAB A – COVER LETTER

Provide the following information about your company. Respond to each item and provide supporting documentation and/or exhibits as requested or desired.

1. Legal Company Name and DBA (if applicable)

Corporate Headquarters:

Address

Telephone Number



Website Address

Location Providing Service (if different from headquarters):

Address

Telephone Number

2. Name of Single Point of Contact

Title

Direct Telephone Number and/or extension

Email Address

3. Name of Person with Binding Authority

Title

Address

Direct Telephone Number and/or extension

Email Address

4. Briefly describe your company's purpose, history, mission and values and explain how they will support the services listed in this RFI. Describe your interest in this type of project and the unique advantage your firm and team bring.

TAB B- QUESTIONS REGARDING UTILITY SOFTWARE SOLUTION

The County request vendors to provide the following information:

1. Customer Information System solutions available that may be beneficial for UCW for the purposes stated in this RFI
2. Configuration information detailing the Customer Information System solution
3. Typical implementation plan

TAB C – COST INFORMATION

The County is seeking the best estimates of a Water Utility Customer Information and Billing System to provide a utility solution and implementation cost that can be obtained from Respondents based upon the information provided in this RFI. The cost information and all information that we receive in response to this RFI will be used as planning estimates (if applicable). No contractual agreement will be made.



7 GENERAL TERMS AND CONDITIONS

The County will not be obligated as a result of this RFI. No contract will result from any response to this RFI. Any future procurement by the County will be the subject of a separate process and subject to final budget appropriations.

Information submitted in response to this RFI will become the property of the County and as such, may be subject to public review.

Information that is confidential or trade secret must be clearly marked as such and separated from the rest of the response. Union County is required to follow North Carolina laws regarding releasing confidential information.

The County will not pay for any information herein requested nor is it liable for any cost incurred by the vendor.



8 APPENDIX A – RFI SUBMISSION

RFI# 2023-29 Customer Information System

This Proposal is submitted by:

Company Legal Name: _____

Representative Name: _____

Representative Signature: _____

Representative Title: _____

Address: _____

County/State/Zip: _____

Email Address: _____

Phone Number: _____

Website Address: _____