



REQUEST FOR PROPOSAL

PWC2526078

ORACLE UTILITIES CUSTOMER CLOUD SERVICE IMPLEMENTATION

Date of Issue: May 26, 2026
Proposal Due Date: June 26, 2026
3:00 p.m.

Direct all inquiries concerning this RFP to:

Shelby Lesane
Procurement Advisor II
procurement@faypwc.com

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**ADVERTISEMENT FOR PROPOSAL
FAYETTEVILLE PUBLIC WORKS COMMISSION
ORACLE UTILITIES CUSTOMER CLOUD SERVICE IMPLEMENTATION**

**Cumberland County
North Carolina**

Proposals are solicited and will be received electronically by the Fayetteville Public Works Commission Procurement Department until **3:00 p.m., EST Friday, June 26, 2026**, for the **ORACLE UTILITIES CUSTOMER CLOUD SERVICE IMPLEMENTATION**.

PWC is soliciting proposals for a qualified vendor to implement Oracle Utilities Customer Cloud Service (CCS). The selected vendor will be responsible for leading all efforts related to transitioning PWC from Oracle Customer to Meter (C2M) to CCS.

PWC reserves the right to award contract(s) to one or more proposers, as determined to be in the best interest of PWC.

Enclosed please find the Instructions to Proposers, Scope of Work, and Proposal Pricing Form. Proposals shall be submitted on the forms provided herein, or exact copies thereof, and the proposer shall return one copy of the entire proposal packet along with the completed Proposal Pricing Form and any other information specified in the proposal documents. Unsolicited proposal samples or descriptive literature may not be examined or tested, will not be used to determine responsiveness, and will not be deemed to vary any of the provisions of the RFP. Failure to comply with these requirements shall constitute sufficient cause to reject a proposal without further consideration.

Questions regarding this Proposal must be submitted in writing to the attention of **Shelby Lesane**, at procurement@faypwc.com no later than **5:00 p.m., EST Thursday, June 11, 2026**, in order to be considered for a response.

Electronic Proposal submittals will be accepted if emailed to procurement@faypwc.com. The email subject must be **RFP: PWC2526078 ORACLE UTILITIES CUSTOMER CLOUD SERVICE IMPLEMENTATION**.

Fayetteville Public Works Commission reserves the right to accept or reject any or all proposals, to waive minor informalities or technicalities as permitted by law, to disregard nonconforming or nonresponsive proposals, and to re-advertise for proposals if deemed in the best interest of PWC. The bid tabulation does not constitute a binding contract with PWC. No contract will be considered awarded until a formal written Agreement is executed by both PWC and the successful proposer. The award of a contract, if made, will be to the lowest responsible, responsive proposer whose qualifications indicate the award will be in the best interest of PWC.

FAYETTEVILLE PUBLIC WORKS COMMISSION
Nikole Bohannon
Procurement Manager

**INSTRUCTIONS TO PROPOSALS
FAYETTEVILLE PUBLIC WORKS COMMISSION
ORACLE UTILITIES CUSTOMER CLOUD SERVICE IMPLEMENTATION**

PURPOSE AND BACKGROUND

PWC is soliciting proposals for a qualified vendor to implement Oracle Utilities Customer Cloud Service (CCS). The selected vendor will be responsible for leading all efforts related to transitioning PWC from Oracle Customer to Meter (C2M) to CCS.

PWC reserves the right to award contract(s) to one or more proposers, as determined to be in the best interest of PWC.

PWC operates as a public authority owned by the City of Fayetteville and is governed by four Commissioners appointed by the Fayetteville City Council. PWC manages, operates, and supervises three utilities – electric, water, and sanitary sewer services - serving more than 112,000 customers daily. PWC has a fully deployed Automated Meter Infrastructure (AMI) network that includes approximately 182,000 meters, including approximately 95,000 water and 87,000 electric meters.

OBJECTIVE OF THE REQUEST

PWC continually invests in infrastructure, technology, and sustainability initiatives to support the evolving needs of its customers and community. PWC is undertaking the initiative to move from Oracle C2M to Oracle CCS to modernize its customer and meter-to-cash platform, address operational and data limitations, and better position the organization for long-term success.

Project objectives include implementing CCS to:

- Align with industry best practices to future-proof technology investments
- Improve efficiency through automation and more streamlined processes
- Strengthen data quality to enable better decision making
- Enhance customer experience through improved service outcomes

ACCURACY OF RFP AND RELATED DOCUMENTS

PWC assumes no responsibility for conclusions or interpretations derived from technical and background information presented in the RFP, or otherwise distributed or made available during the procurement process. In addition, the PWC will not be bound by or be responsible for any explanation, interpretation or conclusions of this RFP or any documents provided by the PWC other than those given in writing by the PWC through the issuance of addenda. In no event may a Proposer rely on any oral statement by the PWC or its agents, advisors, or consultants

PWC RIGHTS

The PWC, at its sole discretion, reserves the following rights:

- A. To supplement, amend, substitute, or otherwise modify the RFP at any time;
- B. To cancel this RFP with or without the substitution of another RFP;
- C. To reject any or all proposals produced in response to the RFP; to take any action

affecting this RFP, this RFP process, or the Services or facilities subject to the RFP that would be in the best interests of the PWC;

- D. To issue additional requests for information, and/or;
- E. To require one or more Proposer(s) to supplement, clarify or provide additional information in order for the PWC to evaluate the responses submitted.

EXPENSE OF SUBMITTAL PREPARATION

The PWC accepts no liability for the cost and expenses incurred by the Proposer in response to this RFP, including preparing requests for clarification. Each Proposer that prepares a Response shall do so at its own expense and with the express understanding that they cannot make any claims whatsoever for reimbursement from the PWC for the costs and expenses associated with the Response.

TRADE SECRETS/CONFIDENTIALITY

Upon receipt at the PWC, your Response is considered a public record, except for material which qualifies as "Trade Secret" information under N.C.G.S. 66-152(3). Your Response will be reviewed by PWC staff and members of the general public who submit public records request.

THE RESPONDER IS REQUIRED TO IDENTIFY ALL CONTENT DESIGNATED AS A TRADE SECRET AS DEVINED PURSUANT TO N.C.G.S. 66-152(3) AND WHICH MEETS THE CRITERIA FOR CONFIDENTIALITY PURSUANT TO N.C.G.S. 132.1.2(1). ALL NOTED TRADE SECRETS MUST FOLLOW PROCEDURES NOTED BELOW AND REQUIRE ATTACHED DOCUMENTATION SPECIFYING HOW THE CONTENT QUALIFIES AS A TRADE SECRET UNDER NORTH CAROLINA LAW. IF AN ENTIRE RESPONSE IS MARKED CONFIDENTIAL OR TRADE SECRET, IT WILL BE DISQUALIFIED FROM CONSIDERATION.

To properly designate material as "trade secret" under these circumstances, each Proposer must take the following precautions.

- A. Any trade secrets submitted by Proposer should be submitted separately in a sealed enveloped marked "Trade Secret – Confidential and Proprietary Information – Do Not Disclose Except for the Purpose of Evaluation to this Response",
- B. Offer documentation specifying how the content qualifies as a trade secret under North Carolina law, and
- C. The "trade secret" should be stamped on each page of the trade secret materials contained in the envelope.

NON-DISCLOSURE/SERVICE AGREEMENT

PWC requires that the selected proposer enter into a Non-Disclosure and Service Agreement for the services provided as a part of this RFP. Samples of the Non-Disclosure and Service Agreement are attached to this Request for Proposals as Appendix B. Any exceptions to the Non Disclosure and/or Service Agreement should be included within the Proposer's response to this RFP.

RFP SCHEDULE

The following table shows the schedule of events to prepare your organization's response. The key deadlines and targeted dates for this process are as follows:

Action	Responsibility	Date/Time
Submit Written Questions	Proposers	Thursday, June 11, 2026 @ 5:00 p.m.
Provide Response to Questions	PWC	Tuesday, June 16, 2026 @ 5:00 p.m.
Submit RFP	Proposers	Friday, June 26, 2026 @ 3:00 p.m.
Award RFP Target Draft	PWC	July 2026
Service Agreement Target Start Date	PWC & Proposer	October 2026

QUESTIONS

Written questions shall be e-mailed to procurement@faypwc.com by the date and time specified in the RFP schedule. Proposers will enter "**RFP ORACLE UTILITIES CUSTOMER CLOUD SERVICE IMPLEMENTATION**" as the subject of the email.

Questions received prior to the submission deadline date, the Procurement Advisor's response, and any additional information deemed necessary by PWC will be posted in the form of an addendum to the PWC website and shall become an Addendum to this RFP. No information, instruction, or advice provided orally or informally by any PWC personnel, whether made in response to a question or otherwise concerning this RFP, shall be considered authoritative or binding. Proposers shall rely only on written material contained in an Addendum to this RFP.

Inquiries should be submitted no later than the date and time noted in the RFP schedule. Questions answered verbally will be followed up by written addenda as deemed necessary; oral interpretations shall have no effect.

REFERENCES

Proposers shall provide five (5) references where the company has implemented the CCS solution, preferably with organizations of similar scale and services as required by this RFP. Additional requirements for references are detailed in the TASKS/DELIVERABLES section of this RFP.

PWC may contact these references to assess whether the Proposer's performance was satisfactory and aligned with industry standards. The information obtained may be considered in the evaluation of the Proposal.

ECONOMIC IMPACT (EI) PROGRAM PARTICIPATION

Fayetteville PWC supports fair and open competition in all procurement activities and encourages participation from qualified businesses of all sizes. For the purposes of PWC procurements, a qualified business is one that demonstrates the capacity, capability, and resources to perform in accordance with the specifications, terms, and conditions of the solicitation. PWC also recognizes

the value that small and locally based suppliers bring to the community and to the efficiency of its operations.

While no specific business certification is required for award, Proposers that are certified as a North Carolina Historically Underutilized Business (HUB), Disadvantaged Business Enterprise (DBE), Small Business Administration (SBA)-certified firm, or PWC Small Local Supplier (SLS) are encouraged to participate and, when applicable, to indicate that status on the SDBE/SLS/Local Disclosure Form included in this solicitation.

VENDOR REGISTRATION VIA ISUPPLIER

- 1) All vendors interested in doing business with PWC must register as a vendor through the iSupplier Portal using the link below. The iSupplier self-service portal enables vendors to have real-time access to information regarding purchase orders, invoices, and payments through a secure environment. Attach a copy of your W9 to your online registration.

<https://www.faypwc.com/isupplier-doing-business-with-pwc/>

SUBMISSION INSTRUCTIONS

- 1) Proposals should be complete and carefully worded and should convey all the information requested in the RFP. Proposals should be prepared simply and economically, providing a straightforward, concise description of the Proposer's capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content. If the Proposal includes any comment over and above the specific information requested in the RFP, the Proposer should include this information as a separate appendix to its Proposal. Proposals that include clarifications or modifications to any of the RFP's contractual requirements, or a Proposer's standard terms and conditions, may be deemed non-responsive and not considered for award at PWC's discretion. Proposals must demonstrate compliance with baseline functional and technical requirements defined in the RFP attachments. Failure to demonstrate compliance with such baseline requirements may result in a Proposal being deemed non-responsive or subject to further clarification and required scope/pricing adjustments.
- 2) Unsolicited Proposal samples or descriptive literature may not be examined or tested, will not be used to determine responsiveness, and will not be deemed to vary any of the provisions of the RFP. Failure to comply with these requirements shall constitute sufficient cause to reject a Proposal without further consideration. PWC reserves the right to accept or reject any or all Proposals, to waive minor informalities or technicalities as permitted by law, to disregard nonconforming or nonresponsive Proposals, and to re-advertise for Proposals if deemed in the best interest of PWC. The Proposal tabulation and announcement of the apparent low Proposer at the Proposal opening do not constitute a binding contract with PWC. No contract will be considered awarded until a formal written Agreement is executed by both PWC and the successful Proposer. The award of a contract, if made, will be to the lowest responsible, responsive Proposer whose qualifications indicate the award will be in the best interest of PWC.
- 3) Proposals may be withdrawn by the Proposer only in writing and if receipt of such withdrawal is acknowledged by PWC prior to the time for the proposal submittal deadline identified in the

Advertisement for Proposers (or such later date included in an Addendum). Written withdrawal requests shall be submitted on the proposer’s letterhead and signed by an official of the proposer duly authorized to make such request. Any withdrawal request made after the proposal submittal deadline shall be allowed only if the price proposal was based upon a mistake that constituted a substantial error, provided the proposal was submitted in good faith, and then only pursuant to the terms of N.C.G.S. § 143-129.1.

- 4) Electronic Proposal submittals will be accepted if emailed to procurement@faypwc.com. The email subject must be **RFP: PWC2526078 – ORACLE UTILITIES CUSTOMER CLOUD SERVICE IMPLEMENTATION**. Late proposals will not be considered.
- 5) Proposals will be examined promptly after the due date and an award will be made at the earliest possible date. Proposals must be held firm for PWC for a period of one hundred and twenty (120) days after the Proposal due date. A purchase order will be issued to the awarded Proposer.
- 6) Proposers shall submit Proposals only on the Proposal Pricing Forms provided herein, or exact copies thereof (See Attachment B – Proposal Pricing Form). Failure to provide full and complete Proposal Pricing Forms using the form provided herein will result in a Proposal being deemed non-responsive.
- 7) All Proposals must be signed by an authorized official of the Proposer. Proposals may be rejected for any omission, alteration of form, additions not called for, conditional Proposal, or any irregularities of any kind.
- 8) Do not submit alternate Proposals unless specifically called for on the Proposal Pricing Forms.

PRICING

- 1) All proposers are advised to include all costs incurred by the proposer in delivering the **ORACLE UTILITIES CUSTOMER CLOUD SERVICE IMPELEMENTATION** in their proposal submittal.
- 2) All proposers must complete each tab of Attachment K (Pricing and Commercial Terms) in addition to Attachment B (Proposal Pricing Form).

EVALUATION

Proposals will be evaluated based on:

Criteria	Total Points Available
Business Scope Fit	20
Implementation Services Scope and Approach	25
Resource Expertise	15
Provider Experience	25
Pricing and Commercial Terms	15
Total Points	100

Proposers may be asked to make a presentation for the PWC selection team to share more information and/or answer questions related to the proposal. If selected to make a presentation, more details will be provided.

AWARD

- 1) An award of a contract is subject to approval by the Department.
- 2) PWC reserves the right to inspect, at a reasonable time, the equipment, item, plant, or other facilities of a prospective Proposer prior to award, and during the Service Agreement term, as PWC deems necessary to determine that such equipment, item, plant, or other facilities conform with the specifications/requirements and are adequate and suitable for the proper and effective performance of the Service Agreement.
- 3) PWC reserves the right to request additional information from proposers to aid in the evaluation process. This information may include but is not limited to, financial statements, a reference list of contracts of similar size, etc.
- 4) PWC reserves the right to make a single award for all items or may award separate contracts to multiple proposers for various items to the lowest responsive, responsible proposer or proposers, taking into consideration product quality, performance to PWC, and conformity with the specifications in these proposal documents. PWC may also consider, among other things, the Proposer's past performance conduct on other contracts, and other information as PWC deems necessary to assist in the evaluation of any proposal.
- 5) The Service Agreement will be awarded and targeted to begin on or about October 2026. The targeted completion date is February 2028. Proposals for earlier or later completion dates will be accepted if the timeline and approach support the proposed timeframe.

PERFORMANCE AND PAYMENT

1. Proposal price shall constitute the total cost to PWC for complete performance in accordance with the requirements and scope of work herein, including all applicable charges handling, administrative, and other similar fees. The proposer shall not invoice for any amounts not specifically allowed for in this RFP. Complete ATTACHMENT B: PROPOSAL PRICING FORM and ATTACHMENT K: PRICING AND COMMERCIAL TERMS and include both in the proposal.
2. Payment for services and deliverables purchased pursuant to this proposal shall be made by Public Works Commission approximately thirty days after the same has been delivered, inspected, approved and the invoice received in the PWC Accounts Payable Office, P.O. Box 1089, Fayetteville, North Carolina 28302.

ATTACHMENT A: SCOPE OF WORK

PROJECT SCOPE

PWC continually invests in infrastructure, technology, and sustainability initiatives to support the evolving needs of its customers and community. PWC is undertaking the initiative to move from Oracle C2M to Oracle CCS to modernize its customer and meter-to-cash platform, address operational and data limitations, and better position the organization for long-term success.

Project objectives include implementing CCS to:

- Align with industry best practices to future-proof technology investments
- Improve efficiency through automation and more streamlined processes
- Strengthen data quality to enable better decision making
- Enhance customer experience through improved service outcomes

CYBERSECURITY REQUIREMENTS & COMPLIANCE

Vendors must comply with:

- NIST Cybersecurity Framework, ISO 27001, or SOC 2 Type 2
- Data Encryption (AES-256 or equivalent)
- Multi-Factor Authentication (MFA) Implementation
- Patch Management & Vulnerability Scanning Procedures

DUE DILIGENCE REQUIREMENTS

- Vendors must complete a Cybersecurity Due Diligence Questionnaire for systems connecting to corporate, SCADA, or cloud environments.
- Signed Non-Disclosure Agreements (NDAs) are required before contract execution.
- Vendors handling sensitive data must undergo an annual cybersecurity certification audit.

INCIDENT REPORTING

Vendors must immediately report any cybersecurity incidents affecting PWC.

TASKS/DELIVERABLES

Proposals must include the following information:

1. Cover Letter (not to exceed 1 page) signed by an authorized individual who commits to the terms and conditions of the company's proposal.
2. Executive Summary, not to exceed two (2) pages. Include a description and history of the company, services provided, and an explanation of how the proposed services/solution best fit PWC's needs.
3. State any conflicts of interest your firm, or any key individuals of the firm, may have with the project or PWC (not to exceed 1 page).
4. Statement of Qualifications to demonstrate ability to meet RFP requirements (not to exceed 10 pages):
 - a. Include a description of office location(s), organizational structure, number of years in business, and annual revenue.
 - b. Demonstrate capacity to fully perform all scope requirements, including a summary of experience, reliability, staffing capacity, competent subcontractors, and financial stability.
 - c. Demonstrate understanding and experience of executing best practices related to CIS implementations, particularly CCS.
 - d. Describe any experience with or knowledge of North Carolina legal requirements and/or regulations pertinent to municipal utilities.
 - e. Provide a total number of W2 full-time, 1099 contract, subcontract, and any outsourced and offshore resources (Full-time/Contractors) for this project.
 - f. Provide an organizational chart to demonstrate how the project team fits within the larger organization.
 - g. Disclose any litigation you are currently involved in, or have been, within the past five (5) years in which the Proposer or your partners/subcontractors were a party.
 - h. Provide details of how and why your company will best serve the needs of PWC.
5. Provide resumes of proposed key personnel (including, but not limited to, Project Manager, Solution Architect, and Technical Lead) and subcontractors. Include time/experience with the Proposer and specific experience relevant to CCS implementations.
 - a. Resumes should highlight experiences of relevant size/scope
 - b. Resources should have experience with Azure DevOps
 - c. QA Testers should have experience with OUTA and automated testing
 - d. Prefer resources to have Redwood experience
6. References (not to exceed 10 pages)
 - a. Proposer shall include a total of five (5) References.
 - i. References must be for applications and services provided within the last five (5) years. Include the client's name, the number of billed accounts and

services they provide, contact person, title, contact information, date of go-live, project duration, software installed, installation issues, and custom features or extensive report capabilities.

- ii. References should be comparable in size and nature to PWC (Public Power/Local Government References are preferred).
 - b. Provide summaries or brief descriptions of a minimum of three (3) projects performed most related to this project's requirements. Limit descriptions to those most relevant to this project and representative of the Proposer's capabilities.
 - c. Proposers must document their prior experience with the required integrations, including specific examples from comparable utility CIS implementations and a clear indication of which integrations are within their demonstrated expertise.
7. Scope of Work
- a. Proposer must complete Attachment L: Implementation Services Scope. This document outlines the minimum services to be included within scope and any pricing impacts. Instructions are included within the first tab of the spreadsheet.
 - b. Proposer must complete Attachment J: Business Scope and Efficiencies. This document aligns business functions with the proposed solution, identifies if the function is included within the out of the box solution, and any pricing impacts. Instructions are included within the first tab of the spreadsheet.
 - c. Detailed narrative explaining implementation approach must be included with the proposal. The narrative must contain at minimum the topics listed in the Technical Approach section of this RFP.
8. Pricing and Staffing
- a. Proposer must complete Attachment K: Pricing and Commercial Terms. This document includes:
 - i. Services Pricing - Used to price all proposed services
 - ii. Reports, Integrations, and Customization Listing - Used to list and estimate all reports, interfaces, and custom work
 - iii. Payment Schedule - Used to define deliverables-based payments by phase
 - iv. Proposed Staffing - Used to define required Proposer and PWC resources for the proposed methodology. Please note that not all PWC team members will be assigned 100% to the project.
 - v. Rate Card - Used to provide hourly rates for project resources
 - vi. Commercial Terms - Used to respond to PWC's commercial framework

PROJECT ORGANIZATION

PWC operates a multisystem customer and meter-to-cash environment anchored by Oracle C2M and supported by integrated enterprise, operational, and third-party applications. PWC is

seeking a qualified System Integrator to implement Oracle CCS and modernize, simplify, and better align the CIS platform with future operational, data, and customer service needs.

Current technology is summarized in Table 1.

Table 1

Type	Technology
Customer Information System (CIS)	C2M V2.7.0.3.0 build 024
iPaaS (Integration Platform as a Service)	Oracle OIC (Oracle Integration Cloud) v26.04
Middleware	Oracle OCI (Oracle Cloud Infrastructure) SOA (Service Oriented Architecture – to be decommissioned)
Customer Portal	VertexOne v10.4.1.2 (MyMeter)
Asset Management	WACS v25.10 MP6.1
Mobile Field Solution	MWM v2.3.0.2.0 build 082 (Mobile Workforce Management) with plans to migrate to OFS (Oracle Field Service)
Financials	Fusion 26A (11.13.26.01.0)
GIS	ESRI v10.6 (to be upgraded to ArcGISPro)
Payments	Catalis AdComp (Kiosk) eBox Western Union Wells Fargo
Customer Credit Checks	Online Utility Exchange
IVR/Phone System	NICE v26.2
OMS	OMS (OSI/Emerson) Kubra Maps (Storm Center Core)
Backflow	SwiftComply
Bill Print	Doxim
Batch Scheduler	Broadcom dSeries Batch Scheduler v25.1
Reporting	FDI Blastpoint Apogee NewGen Spreadsheet Server
Metering	Sensus Device Manager (RNI) v4.16.1 Build 392612

Figure 1 outlines the current architecture for CIS integrations.

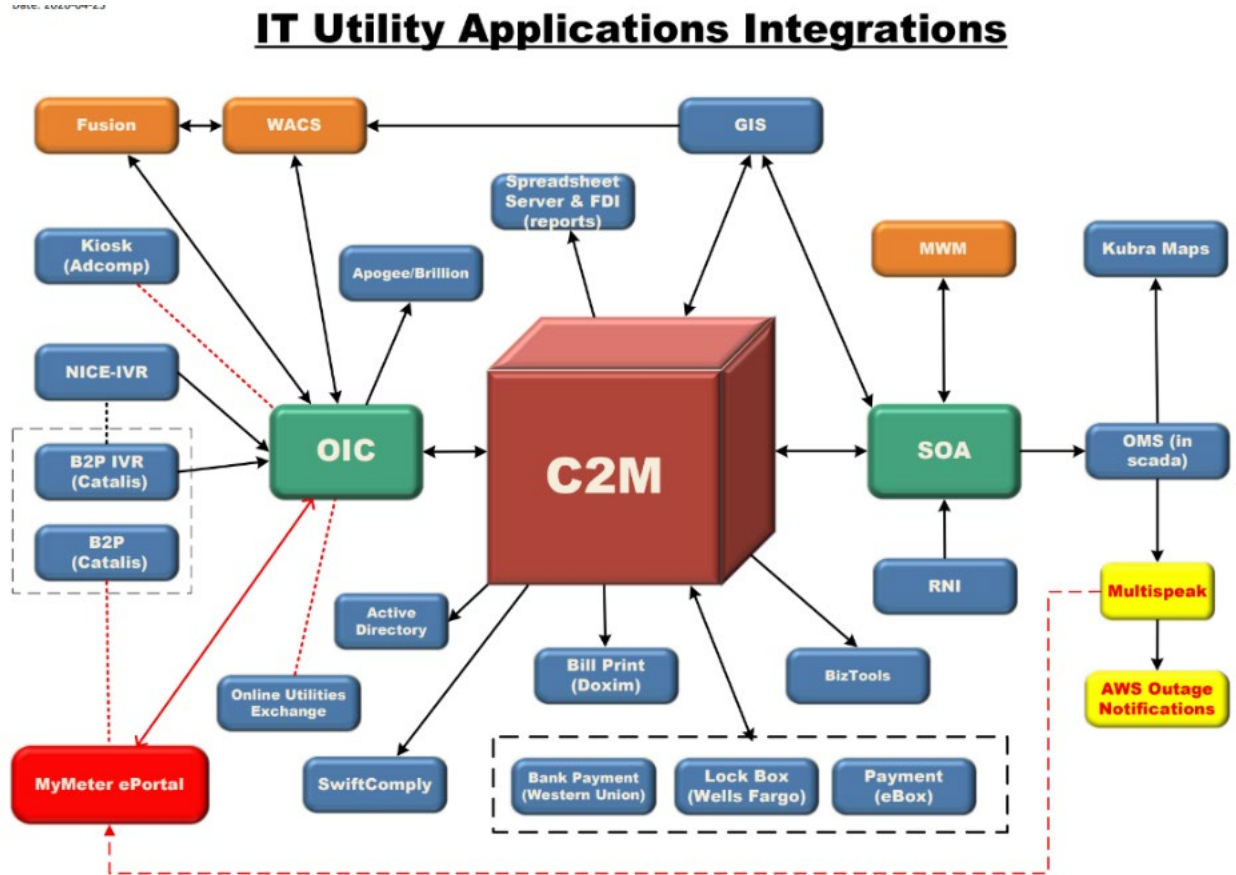


Figure 1

Implementation Strategy

The strategy should emphasize minimizing customizations by adapting business processes to the new system, increasing automation, decentralizing select IT tasks, and strengthening reporting and data management capabilities. Where practical, third-party processes should also

be evaluated for potential in-house adoption to further streamline operations and reduce complexity.

The recommended approach should align all system functionality changes with industry best practices to improve efficiency, data accuracy, and the overall customer experience. This includes:

- migrating integrations from SOA to OIC and fully decommissioning SOA,
- deploying Oracle Utilities Data Intelligence (OUDI),
- implementing Oracle Field Services (OFS) and retiring Oracle Mobile Workforce Management (MWM),
- modernizing integrations to support real-time or native solutions,
- leveraging AI and automation opportunities to improve efficiency and customer satisfaction, and
- ensuring all integrations and reports are compatible with CCS while planning for legacy system retirement.

TECHNICAL APPROACH

PWC requires providers to detail their implementation plan and approach. In addition to the addressing requirements included in the attachments, the narrative should include details on:

1. Implementation approach within the specified project timeline, to include phases and deliverables.
2. Training and knowledge transfer methodologies.
3. Organizational change management strategies.
4. Testing approach and the tools used to support the testing process.
5. Data migration and conversion strategies.
6. Data analysis and reporting capabilities.
7. Project management structure and governance.
8. Protocols for troubleshooting, escalations, or other unexpected issues (i.e., shortage in resources).

QUESTIONS TO PROPOSER

Proposer shall respond to each question in each of the Attachments. Responses should be straightforward, concise, and free of generic marketing materials. Each response must be clear, specific, and complete, with sufficient detail to demonstrate the Proposer's ability to meet the requirements of this RFP and its attachments. Responses will be evaluated accordingly; those that are incomplete, non-specific, or fail to demonstrate capability may require clarification, be scored unfavorably, or impact award consideration at PWC's discretion.

ATTACHMENT B: PROPOSAL PRICING FORM

Proposer Information:

Name of Company

Company Location

Phone Number

Email Address

**Is the company an N.C.
Certified HUB or DBE
Printed Name**

Title

Authorized Signature

Date

Proposers shall submit pricing exclusively on the Proposal Pricing Forms provided in this RFP, or on exact copies thereof. The Proposal Pricing Form must be fully completed and properly executed. Failure to provide a complete submission will result in the Proposal being deemed non-responsive. A fully completed Proposal Pricing Form includes the Proposer's company name, company location, and email address; the name and location of the manufacturer, if applicable; the Proposer's NC HUB or DBE certification status (if applicable); and the printed name, title, signature, and signature date of an authorized company representative. Proposers must also acknowledge all issued addenda. All pricing must remain valid for a minimum of one hundred and twenty days (120) calendar days.

The Proposer has received, acknowledged, and used the following addenda in completing the Proposal. (Initial and Date as appropriate).

Addendum No. 1	Date _____
Addendum No. 2	Date _____
Addendum No. 3	Date _____
Addendum No. 4	Date _____
Addendum No. 5	Date _____
Addendum No. 6	Date _____
Addendum No. 7	Date _____

ATTACHMENT C: CERTIFICATION OF PRIMARY PARTICIPANT REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

The Primary Participant, _____ (major third party contractor), certifies to the best of its knowledge and belief, that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
2. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.

(If the primary participant is unable to certify to any of the statements in this certification, the participant shall attach an explanation to this certification.)

THE PRIMARY PARTICIPANT _____ CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET. SEQ. ARE APPLICABLE THERETO.

Signature

Title

Printed Name

Date

PWC at a Glance



Customers



- In operation since 1905
- Provides Electric, Water & Wastewater Services to more than 250,000 people
- Total Customers: 123,017
- Number of Services: 275,382
 - Electric: 83,918
 - Water: 98,439
 - Wastewater: 93,004
 - Irrigation: 6,426
- Customers with 2+ services: 75%

Customer Service



- Annual Customer Contacts: 443,258
- Average Monthly Calls: 33,657
- Annual Bills Generated: 1.5 Million
- Customer Incentive Programs: 14
- Annual Water Leak Notifications: 20,772 (24 million gal)

Employees



- Number of Employees: 690
- Average Tenure of Employees: 10 years
- Average Age: 45
- Annual Turnover: 6.0%*
- Annual Hours Worked: 1.3 Million

*non retirement

Facilities



- Butler-Warner Generation Plant (268 MW)
 - Electric Service Area: 147 Sq. miles
- P.O. Hoffer Water Treatment Facility (39.5 MGD)
- Glenville Lake Water Treatment Facility (18.0 MGD)
 - Drinking Water Service Area: 116 Sq. miles
- Cross Creek Water Reclamation Facility (25 MGD)
- Rockfish Creek Water Reclamation Facility (21 MGD)
 - Wastewater Service Area: 109 Sq. miles

Electric Operations



- Purchase Wholesale Power from Duke Energy
- Only NC municipal system to own/operate a generation plant (Dispatched for use by Duke Energy)
- Generation Capacity: 265 MW
- Annual MWH Sold: 2 million
- System Peak: 499 MW (Feb. 20, 2015)
- Solar Generation Capacity: 2.9 MW
- Annual Solar Generation: 1,454,371 KWH
- Battery Storage: 2 MW
- Electric Distribution Substations: 32
- Distribution Lines: 1,364 miles
- Transmission Lines: 123 miles
- Streetlights/Area Lights: 38,023

Water/Wastewater Operations



- Population Served: 225,000+
- Drinking Water Treated: 10.645 Billion Gallons/Year
- 100% Compliant for all EPA Drinking Water Standards
- Daily Water Treatment Capacity: 50 MG/Day
- Daily Wastewater Treatment Capacity: 46 MG/Day
- Water/Wastewater Infrastructure: 2,979 miles
- Hydrants: 8,780
- Sanitary Sewer Lift Stations: 79
- Manholes: 34,430

Financial



- FY24 Annual Operating Budget: \$450 Million
- Total Assets: \$1.89 Billion
- Bond Rating: Aa2(Moody's), AA (Standard & Poor's), AA (Fitch)
- Operations & Maintenance Expense per Customer: \$570 (\$618 National Median)
- Annual Cash Contributions to the City of Fayetteville in Lieu of Taxes: \$12.06 Million
- Annual Streetlight Services: \$4.14 Million
- Annual Annexation Construction Costs: \$8.49 Million
- Total Value of Annual Contributions to the City of Fayetteville: \$30.81 Million

Visit www.FayPWC.com to learn more about PWC



For the internal use of Fayetteville Public Works Commission only

Requester/Responsible Employee:

Project Title:

Contract Number:

(Assigned by Procurement)

Bid Number (if applicable)

(Assigned by Procurement)

Account String (w/Budget Code):

(for project funding)

Not to Exceed Amount:

Completion or Termination Date:

Work Scope/Purpose:

Notes: (1) This Service Agreement may be utilized for all services (including legal, accounting, and consulting services). However, (a) for services subject to G.S. 143-64.31 (including but not limited to engineering and surveying services), PWC must first comply with the applicable RFQ requirement, unless exempted by law; and (b) for Information Technology, as defined in G.S. 143B-1320, PWC must first comply with applicable RFP requirements set forth in G.S. 143-129.8..

(2) A purchase order must be generated by Procurement and approved by the CFO to encumber funds.

SERVICE AGREEMENT

This Service Agreement (“Agreement”) is made by and between Fayetteville Public Works Commission (“PWC”), a North Carolina public authority, and _____ (“Provider”), a _____ (each of PWC and Provider is referred to herein as a “Party” and collectively as the “Parties”), as of the date of execution last written below (the “Effective Date”). For good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree as follows:

1. Services. PWC retains Provider to _____ as more particularly described in Exhibit A attached hereto and incorporated herein by this reference (the “Services”). The Services shall be completed on or prior to the deadline(s) set forth in Exhibit A, but in any event no later than _____. In the event of a conflict between the provisions of this Agreement and the provisions of any attachment or exhibit to this Agreement, the terms of this Agreement shall govern. Provider shall not use the existence of this Agreement or the name of Fayetteville Public Works Commission as part of any commercial advertising or marketing of products or services without the prior written consent of PWC.

2. Service Standards. Provider shall perform and deliver the Services in accordance with (a) the professional skill and care ordinarily exercised by other providers delivering services on the same or similar projects; (b) Provider’s professional licensing obligations; and (c) all applicable laws. Provider shall notify PWC promptly of the discovery of errors, omissions, discrepancies, or inconsistencies in the Services rendered. If any of the Services that Provider renders or work product, which includes but is not limited to reports, analyses, designs, specifications, plans, drawings, and other documents, that Provider delivers to PWC contain errors or omissions, Provider shall promptly correct or supplement such Services at no additional cost to PWC. PWC’s acceptance of, use of, or payment for such Services shall in no way alter or reduce the Service standards set forth herein or PWC’s rights hereunder. Provider shall not assign or subcontract or transfer the Services or any rights under or interest in this Agreement without the prior written consent of PWC. Provider shall treat all information from PWC and work product resulting from the Services as confidential and proprietary, unless such information is available from public sources, and Provider shall not publish or disclose

confidential or proprietary information without the prior written consent of PWC for any purposes other than the performance of the Services.

3. Delivery of Services and Ownership of Work Product. Time is of the essence with regard to the delivery of the Services. In the event of suspension or termination of the Services, Provider shall promptly deliver to PWC all work product completed or in progress as of the date of termination along with reproducible documents, drawings, plans, specifications, and electronic records of the completed portion of the Services upon PWC's payment of the undisputed portion(s) of Provider's invoices in accordance with Section 8, Billing and Payment. Provider grants PWC an irrevocable license to use the work product resulting from the Services of Provider. The work product delivered by Provider to PWC in connection with the performance of the Services shall not infringe any intellectual property rights of any third party. Except as otherwise specified in this Agreement, Provider shall not use for its own purposes or allow a third party to use the work product resulting from the Services without the prior written consent of PWC.

4. Compensation. For the Services, Provider shall be compensated at the rates set forth in Exhibit A. Provider's rates shall not be increased during the term of the Agreement or the performance of the Services without the prior written consent of PWC.

5. Payment Limitation. Notwithstanding any other provision in this Agreement to the contrary, the total fees and expenses for the Services shall not exceed _____ and 00/100 dollars (\$_____.00) (the "Cap"). Provider shall promptly notify PWC in writing when Provider has reached ninety percent (90%) of the Cap. The Cap is not a fixed fee to which Provider is entitled. PWC shall be obligated to pay only for Provider's actual time devoted to providing the Services and authorized, documented expenses incurred, not to exceed the Cap.

6. PWC's Duties. PWC shall: (a) timely provide such information in its possession, custody, or control as is reasonably necessary for Provider to perform the Services; (b) communicate promptly to Provider all decisions of PWC and clarifications that are reasonably needed by Provider; and (c) make payments to Provider in accordance with Section 8, Billing and Payment.

7. Representations and Warranties. Provider represents and warrants to PWC that Provider is duly licensed and authorized in the State of North Carolina to perform the Services. Each Party represents and warrants to the other Party that it is duly organized, validly existing and in good standing and has all requisite powers, rights, and authority to execute, enter into, and perform this Agreement in accordance with the terms and conditions of this Agreement, this Agreement constitutes a legal, valid, and binding obligation of such Party enforceable against it in accordance with its terms and the person signing this Agreement on behalf of Provider has been properly authorized and empowered to enter into this Agreement.

8. Billing and Payment; Sales and Use Taxes. Provider shall invoice PWC monthly for Services performed and expenses incurred during the preceding calendar month. All invoices shall provide reasonable detail of the services performed and expenses for which reimbursement may be sought, along with supporting documentation for such expenses. PWC shall pay the undisputed portion of each invoice within forty-five (45) calendar days after PWC's receipt of the invoice. PWC shall reimburse expenses at the lower of actual or reasonable cost, except in regard to expenses that are specifically pre-approved in writing by PWC or are set forth and included in a fixed price service arrangement. All payments from PWC to Provider

shall be transferred electronically to Provider's designated financial institution, and Provider shall, prior to delivery of its first monthly invoice to PWC, supply the name of Provider's financial institution, routing number, and account number on the form available from PWC and provide to PWC a completed and signed IRS Form W-9. Provider has the right to impose a late payment charge of one percent (1%) per month for amounts unpaid by PWC by the date due. Provider shall maintain on a generally recognized accounting basis and retain for at least three (3) years the records supporting Provider's invoices to PWC. In the event of a dispute regarding a monthly invoice or any portion thereof: (a) Provider shall deliver to PWC all records supporting Provider's invoice(s) in dispute within ten (10) calendar days after PWC notifies Provider of the dispute, and Provider shall cooperate with PWC to verify the accuracy of all invoices; (b) Provider shall continue to proceed diligently with the performance of the Services pending resolution of the dispute; and (c) PWC shall pay Provider in accordance with this Agreement for all Services rendered by Provider which are not the subject of the dispute.

If the Services involve repair, maintenance, or installation subject to any sales and use tax under North Carolina law, then Provider shall comply with all of the following requirements so that PWC may recover the amount of the tax permitted under the law:

- a. Furnish PWC documentary evidence showing the material used, sales tax paid, and County paid (County of sale). The documentary evidence shall include Provider's certified statement showing total purchases of materials from each separate vendor and total sales taxes charged to PWC and paid by Provider. The documentary evidence shall also include Provider's certified statement as to the amount paid by PWC for sales tax on the Services delivered by Provider to PWC. A certified form is required even if no sales tax was paid for pay request period. Materials used from Provider's warehouse stock shall be shown in a certified statement at warehouse stock prices and amount of County of Use Tax charged to PWC and paid by Provider;
- b. Provider shall furnish to PWC invoices or copies of invoices for all materials purchased for said work within pay request period, and such invoices shall state the amount of North Carolina Sales Tax, if any, paid for materials. Provider shall also furnish to PWC invoices identifying the amount paid for the sales and use tax on Services that are subject to such taxation under North Carolina law; and
- c. Provider shall not include any tax paid on supplies, tools, and equipment that Provider uses to perform the Service.

9. Termination. Except in regard to Services to be provided for a fixed price, PWC has the right to terminate the provision of Services, with or without cause, by delivering written notice of termination to Provider, and PWC shall be obligated to pay Provider only for work performed and reasonable expenses incurred until delivery of the notice of termination. Either Party may terminate an Agreement to provide Services for a fixed price for cause by delivering written notice of the cause and termination to the other Party, provided that the Party receiving the notice of termination shall have seven (7) calendar days to cure the cause cited in the termination notice. "Cause" means action by the non-terminating Party that constitutes a material breach of this Agreement including, but not limited to, a failure to adhere to a schedule, failure to timely pay, and material failure to produce work product that is consistent with the applicable service standards.

10. Insurance. Provider shall maintain during the provision of Services and for at least three (3) years thereafter (collectively, the "coverage period") the following insurance coverages, which insurance shall be placed with insurance companies authorized to do

business in the State of North Carolina and rated A minus VII or better by the current edition of Best's Key Rating Guide or otherwise approved in writing by PWC:

- (a) Intentionally Omitted.
- (b) commercial general liability insurance with a combined single limit of liability of not less than \$1,000,000 for each occurrence of bodily injury and/or property damage and an annual aggregate of liability of not less than \$2,000,000 for bodily injury and/or property damage, and an annual aggregate of liability of not less than \$2,000,000 for Completed Operations and Products Liability;
- (c) worker's compensation insurance as required by State law; and
- (d) automobile liability insurance with limits not less than \$100,000 each person and \$300,000 each accident for bodily injury and property damage.

Prior to initiating the Services, Provider shall deliver to PWC certificates of insurance confirming each such coverage, and Provider shall direct its insurers to provide annually to PWC certificates confirming each such coverage during the coverage period. PWC shall be named as an additional insured in the comprehensive automobile and commercial liability insurance policies. Commercial general liability coverage shall be written on an "occurrence" basis. Upon PWC's request, Provider shall give prompt written notice to PWC of any and all claims made against the professional liability errors and omissions or malpractice insurance policy during the coverage period. Provider shall not reduce or allow the required insurance coverages to lapse without PWC's prior written approval. All policies for insurance must be endorsed to contain a provision giving PWC a thirty (30) calendar day prior written notice by certified mail of any cancellation of that policy or material reduction in coverage. Should a notice of cancellation be issued for non-payment of premiums or any part thereof, or should Provider fail to provide and maintain certificates as set forth herein, PWC shall have the right, but not the obligation, to pay such premium to the insurance company or to obtain such coverage and to deduct such payment from any sums that may be due or become due to Provider, or to seek reimbursement for said payments from Provider. Any such sums paid by PWC shall be due and payable immediately by Provider upon notice from PWC. The insurance provisions of this Agreement shall not be construed as a limitation on Provider's responsibilities and liabilities pursuant to the terms and conditions of this Agreement. Provider's obligation to maintain insurance for three (3) years after completion of the Services shall survive the termination of this Agreement.

11. Indemnification and Liability. Provider shall indemnify, defend, and hold harmless PWC and its Commissioners, officers, employees, agents, and representatives (collectively, "Indemnitees") from and against all claims, actions, liabilities, damages, losses, costs, and expenses (including, without limitation, injury to or death of any persons and damage to property, economic and consequential damages and attorneys' fees) asserted by one or more third parties against one or more of the Indemnitees arising out of negligent or willful acts, violations of law, infringement of any patent, trademark, trade secret, copyright, or other intellectual property right of a third party, or omissions or breach of the obligations set forth in this Agreement by Provider or any of its employees, agents, representatives, and subcontractors. Provider's obligation to indemnify, defend, and hold harmless the Indemnitees shall survive the termination of this Agreement and shall include the duty to pay for the reasonable attorney's fees and costs associated with defending the Indemnitee(s) by the legal counsel of each Indemnitee's choice.

12. Notices. Any notice which either Party is required or desires to give the other hereunder shall be deemed sufficiently given if, in writing, it is delivered personally, or sent by certified U.S. mail, return-receipt requested, postage prepaid, to the addresses listed hereinbelow, or such other address as either Party shall give to the other Party by written notice in accordance herewith. Any notice given herein by personal delivery shall be deemed delivered when received. Any properly addressed notice given herein by certified mail shall be deemed delivered on the third Business Day after the same is deposited in an official United States Post Office, postage prepaid, or if sooner upon the date when the return receipt therefor is signed, or refusal to accept the mailing by the addressee is noted thereon by the postal authorities.

To PWC:
Fayetteville Public Works Commission
Attn: Timothy Bryant, CEO/General Manager
PO Box 1089
Fayetteville, NC 28302

To Provider:

“Business Day” means each calendar day that is not a Saturday, Sunday, holiday observed by the federal government for its employees, or holiday observed by the State of North Carolina for its employees.

13. Compliance. Provider hereby acknowledges that "E-Verify" is the federal E-Verify program operated by the US Department of Homeland Security and other federal agencies which is used to verify the work authorization of newly hired employees pursuant to federal law and in accordance with Article 2, Chapter 64 of the North Carolina General Statutes. Provider further acknowledges that all employers, as defined by Article 2, Chapter 64 of the North Carolina General Statutes, must use E-Verify and after hiring an employee to work in the United States, shall verify the work authorization of the employee through E-Verify in accordance with NCGS §64-26(a). Provider hereby pledges, attests, and warrants through execution of this Agreement that Provider complies with the requirements of Article 2, Chapter 64 of the North Carolina General Statutes and further pledges, attests, and warrants that all subcontractors currently employed by or subsequently hired by Provider to provide services for PWC shall comply with all E-Verify requirements. Failure to comply with the above requirements shall be considered a breach of this Agreement. Provider hereby further acknowledges that the execution and delivery of this Agreement constitutes Provider's certification to PWC and to the North Carolina State Treasurer that, as of the Effective Date, Provider is not listed on (a) the Final Divestment List created and maintained by the North Carolina Department of State Treasurer pursuant to the Iran Divestment Act of 2015, Chapter 147, Article 6E of the General Statutes of North Carolina (the "Iran Divestment Act"); or (b) the list of companies that the North Carolina State Treasurer determines to be engaged in a boycott of Israel in accordance with Article 6G of Chapter 147 of the General Statutes of North Carolina. Provider represents and warrants to Commission that Provider, and all persons and entities owning (directly or indirectly) an ownership interest in it: (i) are not, and will not become, a person or entity with whom a party is restricted from doing business with under regulations of the Office of Foreign Asset Control ("OFAC") of the Department of the Treasury (including, but not limited to, those named on OFAC's Specially Designated and Blocked Persons list) or under

any statute, executive order (including, but not limited to, the September 24, 2001, Executive Order 13224 Blocking Property and Prohibiting Transactions with Persons Who Commit, Threaten to Commit, or Support Terrorism), or other governmental action; and (ii) are not knowingly engaged in, and will not knowingly engage in, any dealings or transactions or be otherwise associated with such persons or entities described in clause (i) above. The provisions of 41 CFR 60-1.4, 60-300.5(a) and 741.5(a) are hereby incorporated by reference, as applicable. Provider shall at all times during the term of this Agreement comply with Executive Order 11246. Provider shall abide by the requirements of 41 CFR 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities and prohibit discrimination against all individuals based on their race, color, religion, sex, sexual orientation, gender identity, national origin, or for inquiring about, discussing, or disclosing information about compensation. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability or veteran status.

Except in strict compliance with Environmental Laws (defined below), neither Provider nor its employees, agents, contractors, subcontractors, licensees or invitees shall use, handle, store, or dispose of (or permit the use, handling, storing, or disposal of) any hazardous or toxic waste or substance in delivering the Services (or transport, transship or permit the transportation or transshipment of the same over or through the real property managed or operated by PWC) which is regulated, controlled, or prohibited by any federal, state, or local laws, ordinances, and/or regulations, including without limitation the Resource Conservation and Recovery Act, 42 U.S.C. § 6901, et seq. ("RCRA"); the Comprehensive Environmental Response Compensation and Liability Act of 1980, as amended, 42 U.S.C. §9601, et. seq. ("CERCLA"); the Hazardous Materials Transportation Act, 49 U.S.C. §801, et. seq; the Federal Water Pollution Control Act, 33 U.S.C. §1321, et. seq; the Toxic Substances Control Act, 15 U.S.C. ("TSCA"); and the Occupational Safety and Health Act, 29 U.S.C. §651 et seq. (as subsequently amended, "Environmental Laws"). As used herein, hazardous or toxic substances or materials shall include without limitation the following: (1) "hazardous wastes" as defined under RCRA or any other federal, state or local law or regulation, (2) "hazardous substances" as defined under CERCLA or any other federal, state or local law or regulation, (3) gasoline, petroleum, or other hydrocarbon products, by-products, derivatives, or fractions (including spent products), (4) "toxic substances" as defined under TSCA, (5) "regulated medical waste" as defined by 40 C.F.R. § 259.30, (6) any radioactive materials or substances, or (7) asbestos and asbestos containing products. Provider shall comply with the Emergency Planning and Community Right-to-Know Act of 1986, as amended. Provider shall immediately report orally to PWC and confirm in writing within three (3) hours any type of chemical spill that occurs in or on any real property managed or operated by PWC or any spill or release of the waste materials during the performance of the Services.

14. Miscellaneous Provisions. Provider is and shall remain an independent contractor and shall undertake performance of the Services pursuant to the terms of this Agreement as an independent contractor. Nothing contained in this Agreement shall be deemed or construed to create the relationship of principal and agent or of partnership or of joint venture or of any association whatsoever between the Parties. No breach or non-performance of any term of this Agreement shall be deemed to be waived by either Party unless said breach or non-performance is waived in writing and signed by the Parties and then only to the extent specifically stated. No waiver of any breach or non-performance under this Agreement shall be deemed to constitute a waiver of any subsequent breach or non-performance, and for any such

breach or non-performance each Party shall be entitled to such remedies as provided by law. The invalidity, illegality, or un-enforceability of any portion or provision of this Agreement shall in no way affect the validity, legality, and/or enforceability of any other portion or provision of this Agreement. Any invalid, illegal, or unenforceable provision of this Agreement shall be deemed severed from this Agreement, and the balance of the Agreement shall be construed and enforced the same as if the Agreement had not contained any portion or provision which was invalid, illegal, or unenforceable; provided, however, severability shall not prevent this entire Agreement from being void in the event any portion or provision of this Agreement that is of the essence of this Agreement shall be void. This is the entire agreement of the Parties on the subject matter hereof, and all prior negotiations, representations, proposals, letters, agreements, understandings, or other communications between the Parties, whether written or oral, are hereby merged into the Agreement and superseded by this Agreement. This Agreement shall not be modified unless such modifications are evidenced in writing, signed by both Parties. Nothing herein shall be construed to give any right or benefits hereunder to anyone other than the Parties. This Agreement shall be governed by the laws of the State of North Carolina without the application of the laws of any other state. The exclusive venue for all mediations and litigation and any other legal proceedings regarding this Agreement shall be the State and Federal Courts serving Cumberland County, North Carolina, and Provider consents to personal jurisdiction in such courts. Provider irrevocably waives, to the fullest extent permitted by law, any objection that it may now or hereafter have to the laying of the venue of any such suit, action or proceeding in any such court serving Cumberland County or that any such suit, action or proceeding brought in any such court serving Cumberland County has been brought in an inconvenient forum. This Agreement may be executed in counterparts with the same effect as if the signatures to each counterpart were upon a single instrument, and all such counterparts together shall be deemed an original of this Agreement. For purposes of this Agreement, a facsimile copy or scanned copy or photocopy of a party's signature shall be sufficient to bind such party. This Agreement shall be subject to execution by electronic means in accordance with Article 40 of Chapter 66 of the North Carolina General Statutes. The titles of the paragraphs throughout this Agreement are for convenience only and the words contained therein shall in no way be held to explain, modify, amplify, or aid in the interpretation, construction, or meaning of the provisions of this instrument.

15. Morality Clause. If, in the sole opinion of PWC, at any time Provider or any of its owner(s), employee(s), or agent(s) (each party, owner, employee, and agent is an "Actor") engages in any one or more actions that bring disrepute, contempt, scandal, or public ridicule to the Actor or subject the Actor to prosecution or offend the community or public morals or decency or denigrate individuals or groups in the community served by PWC or are scandalous or inconsistent with community standards or good citizenship or may adversely affect PWC's finances, public standing, image, or reputation or are embarrassing or offensive to PWC or may reflect unfavorably on PWC or are derogatory or offensive to one or more employee(s) or customer(s) of PWC, PWC may immediately upon written notice to Provider terminate this Agreement, in addition to any other rights and remedies that PWC may have hereunder or at law or in equity.

16. Conflicts. Except with PWC's knowledge and prior written consent, Provider shall not engage in any activity or accept any employment, interest or contribution that would reasonably appear to compromise Provider's professional judgment with respect to the Services. Provider shall disclose to PWC any business or personal relationship with any Commissioner, officer, director, manager, or supervisor of PWC.

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed by their duly authorized representatives as of the Effective Date.

Fayetteville Public Works Commission

By: _____
Timothy Bryant, CEO/General Manager

By: _____
Name:
Title:

Date: _____

Date: _____

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act (N.C. Gen. Stat. § 159-1 et seq.).

By: _____
Rhonda Graham, Chief Financial Officer

Approved as to form:

Legal Dept.

SAMPLE

ATTACHMENT G: FORM OF EXCEPTIONS – SERVICE AGREEMENT

PROPOSER:

INSTRUCTIONS: The following is a list of exceptions to the Service Agreement pertaining to the. Proposers shall identify each exception by page and paragraph number on this form. The omission of exceptions shall be interpreted as the Proposer’s confirmation of full compliance with the Service Agreement.

PAGE NO. AND PARAGRAPH	EXCEPTION/VARIATION

If, in submitting this Proposal, the Proposer has made any exceptions to Proposal documents, the Proposer understands that PWC will evaluate the effect of such exceptions or variations in determining responsiveness and award eligibility. Material exceptions or variations will not be considered and may result in the Proposal being deemed nonresponsive.

ATTACHMENT H: SMALL AND DISADVANTAGED BUSINESS (SDBE), SMALL LOCAL SUPPLIER (SLS), AND LOCAL BUSINESS DISCLOSURE FORM

Company Name: _____
 Address & Phone: _____
 Name: _____
 Pay Application # _____

Please complete the form below by providing the necessary information for the payments made to each subcontractor, vendor, or supplier for the work associated with the identified contractor application for payment. This form must be fully completed and attached to each contractor application for payment.

Firm Name	SDBE, SLS, or Local	Construction Trade or Supplies	Payment Amount
<i>Ex. ABC Company</i>	<i>SDBE – NC HUB M</i>	<i>Hauling</i>	<i>\$25,000.00</i>
<i>Ex. DEF Enterprise</i>	<i>SLS – PWC</i>	<i>Paint</i>	<i>\$600.00</i>
<i>Ex. GHI Incorporated</i>	<i>Local – Fayetteville</i>	<i>Tire Repair</i>	<i>\$2,000.00</i>

 Signature

 Printed Name Title

 Date

ATTACHMENT I: PROPOSAL SUBMITTAL CHECKLIST

To ensure your Proposal is considered for evaluation and potential award, the following forms and required information must be submitted in full. Each item on this checklist must be completed and provided with your Proposal response. Failure to submit any required documentation or information may result in disqualification. Please carefully review the checklist to confirm all required materials are included before submitting your Proposal.

- 1. Proposal Emailed Before the Due Date (Submission Instructions paragraph 5)
- 2. Attachment A: Scope of Work Response (completed and provided), including:
 - a. Project Scope
 - b. Tasks/Deliverables with timeline
 - c. Project Organization
 - d. Implementation Strategy
 - e. Technical Approach
 - f. Responses to Attachments
- 3. Attachment B Company Name, Company Location, Phone Number, and Email Address (completed and signed)
- 4. Attachment H NC HUB or NC DBE classification, if applicable (provided)
- 5. Attachment B Printed Name, Title, Signature, and Signature Date (provided)
- 6. Attachment B Price (provided)
- 7. Attachment B Addenda Acknowledgement (initialed and dated)
- 8. Attachment C (completed and signed) or Explanation (provided)
- 9. Attachment F Form of Exceptions – Scope of Work (completed and provided, if applicable)
- 10. Attachment G Form of Exceptions – Service Agreement (completed and provided, if applicable)
- 11. Attachment H SDBE, SLS, and Local Supplier Disclosure Form (completed)
- 12. Attachment J Business Scope and Efficiencies (completed)
- 13. Attachment K Pricing and Commercial Terms (completed)
- 14. Attachment L Service Scope (completed)

PLEASE NOTE:

Responses provided in Attachment J (Business Scope and Efficiencies), Attachment K (Pricing and Commercial Terms), and Attachment L (Services Scope) will be used to evaluate the Proposer's ability to meet required (baseline/must have) functions. Responses indicating Partial or Do Not Comply for requirements must be clearly explained, including the proposed remediation approach, associated impacts, and whether additional scope or cost is required. Failure to adequately address baseline gaps may impact evaluation scoring or result in disqualification at PWC's discretion. See the "Instructions" tab on each document for more information.

ATTACHMENT J: BUSINESS SCOPE AND EFFICIENCIES



Fayetteville Public Work Commission Oracle CCS Implementation Project Business Scope and Efficiencies

Instructions to Providers:

Provider Name: <<PLEASE INSERT NAME>>

Please respond to each line item in:

Column H - If your implementation approach can deliver the function choose COMPLY, can partially perform the Function choose PARTIAL, or can not perform the requirement choose DO NOT COMPLY. Please provide the name of the software module that will accomplish the function and, if applicable, indicate if it has been included in your price - YES or NO and provide additional detail or commentary to help PWC better understand what functionality you are able to provide, how you will provide it and to what extent. Providing additional details and comments will be looked upon favorably.

Column I - Indicate if this included in proposed pricing.

Column J - Add any additional comments or assumptions to clarify response.

NOTE: PWC's intent is to implement best practices based on out of the box functionality. If customization, or any modification that may impact future updates to the application, is required to meet any function, select "Do Not Comply". Add notes to Column J to explain the response.

Business Function - [Area]

Business Scope and Efficiencies. PWC has defined the Business Scope of this initiative as what we need the solution to do to support not only our current business needs and the business functions, but also what efficiencies and automation we seek to achieve to advance how we can better serve our ratepayers and the employees who support them. PWC is not looking to lose existing functionality; the expectation is that the solution proposed, at a minimum, be able to do what we do today but also enable quantifiable efficiencies through new design, process, or automation. As such, this worksheet focuses primarily on those areas of our business where PWC seeks efficiencies rather than on features of the product.

PWC is looking for the following areas of the Business to be supported by the solution in those functions where there are direct and indirect touchpoints with the customer/ratepayer:

Customer Service - (Customer Service, Customer Self Service, Customer Communications, Customer Data, and Customer Programs)

Billing and Rates - (Rates, Bill Simulation, Complex Billing, Financial Adjustments, Exception Handling and Invoice Production)

Finance - (Revenue Reporting, Financial Controls, Reconciliation, Accounts Payable Processing, and Escheatment)

Credit & Collection - (Collections Processing, Payments Processing and Reversals, Deferred Payment Options, Write-Off, and Bankruptcy)

Metering and Field Operations - (Meters and Equipment Inventory, Meter Reading and Consumption, New Services, Service Orders/Requests)

Integrations - (Customer Portal, Payment, Billing Print, Field Ops and Meter Data, Core, Analytics, and Reporting/Extracts)

The following tabs of this workbook are aligned to these business areas. These tabs describe the functionality that PWC expects as a baseline and highlights those areas where PWC seeks to the solution to achieve efficiencies. Each function has a high-level description of the type of automation desired and a "Baseline Capability/PWC Importance" indicator that reflects the following:

Baseline	These are product features that PWC currently uses and are the minimum features we need to operate our business. We expect each provider being evaluated to include these functions in the scope and price.
Should Have	The should-haves are the features that are not essential to have in their entirety, but will add substantial value and drive efficiencies if the automation or efficiency is achieved. These are functions PWC evaluated as "we do this today but are looking to drive efficiencies". Most of the functions in these lists fall into this category. These items will be weighted heavily when evaluating the applications/solutions.
Could Have	These are the features that PWC would most likely implement, considering time and budget. If not available now, we would like to know when the feature may be available based on the solution's roadmap.

Business Drivers and Objectives Matrix

#	Project Objective	Business Driver	Stakeholder Priority	Success Criteria
1	Align with industry best practices	Future-proof technology investments	High	Adoption of proven SaaS models and standards
2	Improve efficiency through automation	Optimize resource utilization, identify AI and automation opportunities	High	Fewer manual touches, more streamlined processes, and improved operational throughput
3	Improve data accuracy and accessibility	Enable better decision-making	High	Real-time data availability and fewer data errors
4	Enhance customer experience	Increase satisfaction and engagement	High	Faster response times, improved customer satisfaction

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
					(Comply, Partial, Do Not Comply)	(Y/N)	(Y/N)	Explain how the software and solution achieves the business outcome
1	Customer Service/ Customer Programs	Send Customer Communications (Letters, Emails, Text, Outbound calls)	Today, customer communications are largely manual and performed outside the CIS using tools such as Microsoft Word, email, mail merge, and ticketing systems, with multi-step approval processes, limited automation, and reporting maintained in external systems; the Utility requires that the proposed solution include and support these existing Customer Service communication capabilities while enabling them to be performed directly within Oracle CCS to ensure continuity of operations.	Baseline				
2	Customer Service/ Customer Programs	Send Customer Communications (Letters, Emails, Text, Outbound calls)	The Provider shall provide functionality within Oracle CCS to centrally store, manage, and govern customer communication templates, including support for configurable approval workflows that route new or modified templates to designated management roles for review and approval prior to use.	Should Have				
3	Customer Service/ Customer Programs	Send Customer Communications (Letters, Emails, Text, Outbound calls)	The Provider shall enable Oracle CCS to automatically populate standard data elements (e.g., customer, account, premise, service agreement status, dates, amounts) within communication templates and provide a library of standard, reusable templates that users can easily select for commonly used customer correspondences.	Should Have				
4	Customer Service/ Customer Programs	Send Customer Communications (Letters, Emails, Text, Outbound calls)	The Provider shall ensure Oracle CCS maintains a complete historical record of all customer communications sent, including channel, date/time, content, and recipient, and that this history is accessible to authorized users directly within the CIS for customer service, audit, and compliance purposes.	Baseline				
5	Customer Service/ Customer Programs	Send Customer Communications (Letters, Emails, Text, Outbound calls)	The Provider shall provide process-driven automation within Oracle CCS to generate customer communications using approved templates based on defined business events, triggers, or workflows, reducing the need for manual document creation.	Should Have				
6	Customer Service/ Customer Programs	Send Customer Communications (Letters, Emails, Text, Outbound calls)	The Provider shall support the use of Oracle CCS templates to generate and send communications related to customer programs and services, including but not limited to subscription notifications, area lighting events (e.g., cut-off notices), and annexation-related communications, without requiring external tools or manual processes.	Should Have				
7	Customer Service	Send Customer Communications (Letters, Emails, Text, Outbound calls)	The Provider shall provide functionality within Oracle CCS to capture and maintain customer communication preferences by communication type (e.g., billing, collections, program notifications, service notices) and delivery channel (e.g., mail, email, text).	Should Have				
8	Customer Service/ Customer Programs	Process New Service Requests/New Construction	The Provider shall ensure that Oracle CCS provides all business functionality currently in the existing FPWC Oracle C2M environment of new construction, lighting, and irrigation service requests.	Baseline				
9	Customer Service/ Customer Programs	Process New Service Requests/New Construction	The Provider shall provide workflow-driven Case Management functionality that enforces completion of defined Case lifecycle steps prior to closure.	Could Have				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
10	Customer Service/ Customer Programs	Process New Service Requests/New Construction	The Provider shall provide Oracle CCS functionality to support end-to-end handling of new service construction and development requests, including the ability to initiate, manage, and track service order creation and associated billing readiness and traceability directly within the CCS application. This functionality shall reduce manual workarounds, improve coordination among customer, field, construction, and billing teams, and establish CCS as the system of record for new service construction workflows with full service-to-billing traceability.	Should Have				
11	Customer Service/ Customer Programs	Process New Service Requests/New Construction	The Provider shall configure and/or update Oracle CCS rate determination logic to derive meter size from the currently installed device associated to the Service Point (SP), rather than relying on a manually maintained Service Point characteristic.	Should Have				
12	Customer Service/ Customer Programs	Process New Service Requests/New Construction	The Provider shall provide functionality within the CIS to automatically create and apply predefined backflow-related characteristics when a Service Point (SP) type requiring backflow inspection (e.g., irrigation) is selected.	Should Have				
13	Customer Service/ Customer Programs	Create/Look up a Field Work Request	The Provider shall provide and configure Oracle Customer Cloud Service (CCS) to fully support and, at a minimum, preserve all functionality currently used by the Utility to create, search for, manage, and track Field Work Requests and Field Activities, including support for standard, after-hours, and exception-based workflows.	Baseline				
14	Customer Service/ Customer Programs	Create/Look up a Field Work Request	The Provider shall configure Oracle Customer Cloud Service (CCS) to support user navigation and search across multiple Service Points associated with a single Premise, including list-based views and navigation controls, to allow users to efficiently select and review the next or alternate Service Point when multiple Service Points exist.	Could Have				
15	Customer Service/ Customer Programs	Create/Look up a Field Work Request	The Provider shall provide Field Activity and Work Order functionality within Oracle CCS that enforces required, sequential completion of defined work steps prior to allowing progression to subsequent steps or closure of the Field Activity.	Could Have				
16	Customer Service	Manage customer profile information and their communication preferences	The Provider shall configure Oracle Customer Cloud Service (CCS) to support Customer Service Representatives (CSRs) in managing customer identity, contact information, relationships, and communication preferences in a manner that maintains existing operational functionality while supporting regulatory, legal, and business requirements with full auditability, as it does today.	Baseline				
17	Customer Service/ Customer Programs	Manage customer profile information and their communication preferences	The Provider shall implement and enable Oracle CCS Communication Preferences functionality to manage customer communication delivery options in alignment with the utility's business requirements.	Baseline				
18	Customer Service/ Customer Programs	Manage customer profile information and their communication preferences	The Provider shall configure the Oracle Customer Cloud Service (CCS) Start Service workflow to include a system-driven prompt or validation step requiring Customer Service Representatives (CSRs) to review and, as needed, update the customer's mailing preferences and correspondence address during Start Service processing.	Could Have				
19	Customer Service/ Customer Programs	Start, Stop and Transfer Services	The Provider shall configure Oracle Customer Cloud Service (CCS) to successfully complete Start Service, Stop Service, and Transfer Service transactions end-to-end, including prerequisite validation, service selection, credit/deposit processing, rate assignment, field activity generation and routing, exception handling, and full audit/documentation—without introducing additional manual workarounds or increased cycle times.	Baseline				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
20	Customer Service	Start, Stop and Transfer Services	The Provider shall configure Oracle Customer Cloud Service (CCS) to monitor and identify meters with unbilled usage exceeding Utility-defined time and/or consumption thresholds through configurable exceptions, reporting, or workflows, enabling proactive resolution to reduce unrecovered revenue and minimize high-dollar back-billing impacts on customers.	Baseline				
21	Customer Service	Start, Stop and Transfer Services	The Provider shall propose, configure, and implement an AI-enabled capability integrated with Oracle Customer Cloud Service (CCS) to automate and support customer Start, Stop, and Transfer (SST) service requests by intelligently classifying requests, validating required data, applying configurable business rules, and initiating standard CCS SST transactions using delivered CCS configuration, APIs, or supported extension mechanisms, without modifying CCS source code.	Baseline				
22	Customer Service	Start, Stop and Transfer Services	The Provider shall configure Oracle Customer Cloud Service (CCS) to accept and process device on/off status updates from the Remote Network Interface (RNI) and synchronize this information consistently within CCS.	Should Have				
23	Customer Service/ Customer Programs	Start, Stop and Transfer Services	The Provider shall provide functionality within Oracle CCS to support future-dated stop transactions for flat rate service agreements. The solution shall ensure that Community Solar subscriptions can be scheduled for termination on a future effective date without requiring manual workarounds or post-dated processing. Automated Case and Notification Management	Should Have				
24	Customer Service	Start, Stop and Transfer Services	The Provider shall configure Oracle Customer Cloud Service (CCS) to monitor and identify meters with unbilled usage exceeding configurable time-based and usage-based thresholds (e.g., greater than one billing period or above defined usage limits) through system-driven exceptions, reporting, or workflow, enabling timely investigation and accurate customer-to-service traceability.	Should Have				
25	Customer Service	Enroll Customer in eBill/autopay	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that fully supports and, at a minimum, maintains the utility's current capabilities for electronic billing (eBill) enrollment and AutoPay enrollment and management, including both customer self-service and CSR-assisted processes.	Baseline				
26	Customer Service	Enroll Customer in eBill/autopay	The Provider shall provide and configure a solution within Oracle Customer Cloud Service (CCS) to automatically generate an action to stop automatic payment drafts when a final bill is issued and no other active service agreements remain on the account.	Should Have				
27	Customer Service	Enroll Customer in eBill/autopay	The Provider shall configure functionality within Oracle Customer Cloud Service (CCS) to establish maximum automatic draft limits (due to high usage caused by leaks or back billing), defined by Utility-specified percentage and/or dollar thresholds, and to automatically generate customer notifications using configurable correspondence templates and the customer's preferred communication method when a draft exceeds or is prevented by the configured limit.	Could Have				
28	Customer Service/ Customer Programs	Search for Existing Records (IE: Customers, Accounts and Premises - Service Addresses)	The Provider shall provide search record functionality that fully preserves the utility's current capabilities that enable Customer Service Representatives (CSRs) to search, locate, and review existing customer, account, premise, and meter information efficiently and accurately.	Baseline				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
29	Customer Service/ Customer Programs	Search for Existing Records (IE: Customers, Accounts and Premises - Service Addresses)	The Provider shall configure Oracle Customer Cloud Service (CCS) to provide a centralized and intuitive view of device information that clearly associates each device with its related service point, service point type, and premise address.	Could Have				
30	Customer Service	Search for Existing Records (IE: Customers, Accounts and Premises - Service Addresses)	The Provider shall configure Oracle Customer Cloud Service (CCS) to provide list-level and search-level visibility for completed To Dos equivalent to that available for open To Dos, including display of related Account, Premise, and summary information directly within To Do search results without requiring users to open individual records.	Could Have				
31	Customer Service	Search for Existing Records (IE: Customers, Accounts and Premises - Service Addresses)	The Provider shall configure Oracle Customer Cloud Service (CCS) to enable search functionality using a customer's email address stored on the Person/Business record.	Could Have				
32	Customer Service/ Customer Programs	Search for Existing Records (IE: Customers, Accounts and Premises - Service Addresses)	The Provider shall provide functionality that delivers a role-based CSR landing page (home/workspace) that enables users to quickly locate existing records through enhanced search capabilities.	Could Have				
33	Customer Service	Explain a customer's bill	The Provider shall provide functionality that fully supports and, at a minimum, preserves the utility's current ability for Customer Service Representatives (CSRs) to explain, validate, and reconcile customer bills using standard tools and views.	Baseline				
34	Customer Service	Explain a customer's bill	The Provider shall configure Oracle Customer Cloud Service (CCS) to accurately execute balance transfers between Service Agreements (SAs) as a single, controlled transfer event that results in (1) a debit (charge) posted to the destination (receiving) SA, and (2) a corresponding credit posted to the source (originating) SA, for the same transfer amount, with a clear, system-generated linkage that allows the two transactions to be traced as a matched pair.	Should Have				
35	Customer Service/ Customer Programs	Enroll customers in utility programs and services	The Provider shall provide functionality that preserves the utility's current capabilities to administer, manage, and monitor customer programs (e.g., Budget Billing, Conservation Audits, Energy Efficiency Programs, Rebates, and Community Solar). Authorized users shall be able to configure, enroll, maintain, adjust, and discontinue programs using standard tools, workflows, roles, and controls, with full lifecycle support including eligibility, billing and credits, approvals, customer communications, monitoring, and close-out.	Baseline				
36	Customer Service/ Customer Programs	Enroll customers in utility programs and services	The Provider shall configure Oracle Customer Cloud Service (CCS) to support automated processing for Community Solar stop requests by automatically generating a related Case upon stop creation and supporting configurable timelines for Case completion and escalation to improve operational efficiency and case management.	Baseline				
37	Customer Service/ Customer Programs	Enroll customers in utility programs and services	The Provider shall deliver configuration or rules-based automation to support tiered or reduced connection fees when a customer enrolls in more than one Community Solar service agreement.	Baseline				
38	Customer Service	Create/Enroll Customer in payment arrangement, extension	The Provider shall provide functionality that fully supports and, at a minimum, preserves the utility's current payment plan and payment arrangement capabilities.	Baseline				
39	Customer Service	Create/Enroll Customer in payment arrangement, extension	The Provider shall describe the capability within Oracle CCS to support automated allocation of payment arrangement amounts across multiple Service Agreements (SAs).	Could Have				
40	Customer Service	Create/Enroll Customer in payment arrangement, extension	The Provider shall provide functionality within Oracle CCS to ensure that when a customer fails to comply with the terms of a payment arrangement or payment plan, any deferred or restructured debt is returned to its original delinquency aging buckets.	Baseline				

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41	Customer Service/ Customer Programs	Set up a new Customer and Account	The Provider shall provide functionality that fully supports and preserves the utility's current ability to create and maintain person and account records, enabling Customer Service Representatives to accurately capture and manage personal, contact, and account information—including proper name and address formatting, authorized callers, primary phone numbers, mailing and e-Bill preferences, financial responsibility designation, and credit rating updates based on credit check results.	Baseline				
42	Customer Service	Set up a new Customer and Account	The Provider shall describe available functionality or configurable options within Oracle CCS to support the maintenance and correction of sensitive person identification data, including the ability to update a Person's Social Security Number (SSN) under controlled and auditable conditions.	Should Have				
43	Customer Service	Explain customer's metering and consumption history	The Provider shall preserve the utility's existing capability for authorized users to view and explain customer metering and consumption history, including access to 360-Degree View usage, meter configuration, readings, and historical trends to support high-bill inquiries and meter investigations.	Baseline				
44	Customer Service/ Customer Programs	Explain customer's metering and consumption history	The Provider shall propose, configure, and implement an AI-enabled analytical capability integrated with Oracle Customer Cloud Service (CCS) that enables authorized utility users to efficiently explain and investigate customer metering and consumption information during high-bill inquiries and meter investigations.	Could Have				
45	Customer Service	Explain customer's metering and consumption history	The Provider shall provide functionality within Oracle CCS to automatically assess applicable fees upon the successful completion or closure of a Field Activity (FA).	Baseline				
46	Customer Service	Explain customer's metering and consumption history	The Provider shall propose and implement a solution within Oracle CCS and its metering integrations to ensure that all valid smart meter readings available in the head-end / meter network system (RNI) are reliably and consistently ingested for billing and operational use.	Baseline				
47	Customer Service	Explain customer's metering and consumption history	The Provider shall propose and implement a solution that uses AI-assisted capabilities within Oracle CCS or associated integrated platforms could be used to monitor smart meter data ingestion, identify anomalies, missing or delayed readings, or systemic ingestion issues, and support proactive operational response.	Could Have				
48	Customer Service/ Customer Programs	Add or Review Customer Notes	The Provider shall provide functionality that fully supports and, at a minimum, preserves the utility's current capabilities to create, access, and manage Customer Contacts and related workflow items (To Dos).	Baseline				
49	Customer Service/ Customer Programs	Add or Review Customer Notes	The Vendor shall provide and maintain the Utility's existing integration between Oracle Customer Cloud Service (CCS) and the NICE IVR platform to support outbound high-usage notifications, including the automated creation of a Customer Contact on the customer account documenting that the customer was notified, using the Utility's existing contact type and predefined note text.	Baseline				
50	Customer Service	Add or Review Customer Notes	The Provider shall provide functionality within Oracle CCS to prevent loss of in-progress customer contact notes entered in the "Quick Text Contact" (or equivalent) section when a user navigates to another page and returns.	Could Have				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
51	Customer Service/ Customer Programs	Add or Review Customer Notes	The Provider shall provide integration and/or configuration within Oracle CCS to automatically create a customer contact record for inbound calls routed from the IVR to a CSR, when IVR to CCS account lookup is successful, capturing key interaction metadata.	Could Have				
52	Customer Service	Register customer for self service account	The Provider shall configure Oracle CCS to create a Customer Contact via integration with the Utility's self-service portal when an account is registered, including appropriate contact type, channel, and date/time attribution.	Baseline				
53	Customer Service	Register customer for self service account	The Provider shall configure Oracle CCS to create a Customer Contact record on the customer account upon self-service portal requests for utility program enrollment (e.g., e-billing, AutoPay, payment plans), ensuring the interaction is captured for customer history and audit purposes.	Could Have				
54	Customer Service	Record a service Interruption (planned or unplanned outage)	The Provider shall provide functionality that fully supports and preserves the utility's current ability to supply accurate, timely, and consistently synchronized customer contact and service location data—including primary phone number(s), premise address information, and associated device or meter identifiers—from CCS to the Outage Management System (OMS) to support outage response and dispatch operations for electric and water services.	Baseline				
55	Customer Service/ Customer Programs	Water and waste water service point management	The Provider shall provide functionality that fully supports and preserves the utility's current Water and Wastewater Service Point (SP) management capabilities, including the association of multiple services at a single premise and the enforcement of business rules that ensure the correct creation and activation of separate water and wastewater service agreements (SAs) when service is started.	Baseline				
56	Customer Service/ Customer Programs	Water and waste water service point management	The Provider shall analyze the current Oracle CCS/C2M Service Point and Service Agreement model and recommend a best-practice solution to prevent premature service activation when water and waste water services are in a new development or pending state.	Could Have				
57	Customer Service/ Customer Programs	Case Management	The Provider shall configure Oracle Customer Cloud Service (CCS) Case Management and To Do functionality with dedicated Case Types, To Do types, and assigned security roles to support business processes, ensuring appropriate task and case routing, visibility, ownership, and segregation of duties from other business functions.	Baseline				
58	Customer Service/ Customer Programs	Customer Communications	The Provider shall configure AI Generated Call Summary to enable automatic summarization and categorization of call transcripts using generative AI and allow agents to review and edit the summary.	Baseline				
59	Customer Service/ Customer Programs	Customer Communications	The Provider shall configure Real-Time Insight Summarization that includes automated summary of customer's recent interactions from IVR, website, and phone calls.	Baseline				
60	Customer Service/ Customer Programs	Customer Communications	The Provider shall configure Live Insights (if available, currently on Oracle roadmap) to provide real-time, context aware insights using the customer's language and situation to support personalized and efficient conversations.	Baseline				
61	Customer Service/ Customer Programs	Customer Communications	The Provider shall leverage Service Guide Integrated Call Controls to ensure consistent service, compliance, and efficient work flow execution across utility customer interactions.	Baseline				

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					(Comply, Partial, Do Not Comply)	(Y/N)	(Y/N)	Explain how the software and solution achieves the business outcome
1	Finance	Analyze and manage all revenue and collections related reports and data access	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that preserves the utility's current ability to access, extract, and report on revenue and collections data, including real-time and batch data retrieval and daily integration of financial data with Oracle Fusion General Ledger.	Baseline				
2	Finance	Analyze and manage all revenue and collections related reports and data access	The Provider shall propose and implement a solution using Oracle-delivered AI capabilities available within Oracle Customer Cloud Service (CCS) to automate reporting and dashboard assistance using CCS data.	Could Have				
3	Finance	Analyze and manage all revenue and collections related reports and data access	The Provider shall propose AI agent capabilities that assist authorized users in assembling recurring reports, generating narrative summaries, answering "why" questions (variance drivers), and guiding users to supporting Oracle CCS records and details, while enforcing Utility security, approvals, and audit logging.	Could Have				
4	Finance	Analyze and manage all revenue and collections related reports and data access	The Provider should provide and/or configure Oracle CCS to retrieve, consume, and display sales revenue and billing-related financial metrics in a near real-time dashboard within CCS to support ongoing monitoring by Rates and Finance and improve visibility into revenue billed.	Should Have				
5	Finance	Analyze and manage all revenue and collections related reports and data access	The Provider shall configure and implement Oracle CCS reporting dashboards that present utility revenue and consumption/usage metrics aggregated and trendable by Customer Class and Rate Code, with the ability to filter and drill down to supporting account, service agreement, and billing detail.	Could Have				
6	Finance	Manage and process Refunds/ Requests to Accounts Payable	The Provider shall provide Oracle CCS functionality that preserves the utility's current refund processing capabilities, including identification of refundable credit balances, integration with Oracle Fusion for check issuance, daily transmission of required customer and refund details, and receipt of updates from Fusion to reverse refunds and restore balances to service agreements when checks are canceled.	Baseline				
7	Finance	Manage and process Refunds/ Requests to Accounts Payable	The Provider shall provide an integration between Oracle Fusion and Oracle CCS to automate refund check reversal processing when a refund check is returned, canceled, voided, or otherwise not successfully negotiated.	Could Have				
8	Finance	Perform financial adjustments (leak adjustments, customer service adjustments, etc.)	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to manually enter, approve, apply, and track financial adjustments across service agreements, including damage fees, surcharges, promotional credits, assessment roll-offs, write-downs, and other customer or billing-initiated adjustments with appropriate role-based approvals.	Baseline				
9	Finance	Perform financial adjustments (leak adjustments, customer service adjustments, etc.)	The Provider shall provide a configurable dashboard within Oracle CCS to display current-month totals for Tampering and all "Damages" adjustment amounts.	Could Have				
10	Finance	Manage cash postings, balancing, reconciliation, bank settlement with GL and CIS	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to post payments from all payment channels, associate payments with correct distribution codes and GL account strings, transmit complete payment and accounting data to Oracle Fusion, and support cash balancing, reconciliation, and bank settlement processes.	Baseline				
11	Finance	Manage Escheatment Processing (unclaimed refunds)	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to support escheatment processing by providing visibility into customer refund eligibility, enabling credit reapplication to active accounts or service agreements, and supporting coordination with Accounts Payable when funds are remitted as unclaimed property.	Baseline				

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12	Finance	Reports	The Provider shall provide Oracle CCS functionality that preserves the utility's current reporting capabilities across rates, billing, accounting, and finance, including continued access to CIS-sourced operational and financial data, support for existing usage, reconciliation, assessment, billing schedule, unbilled revenue, and payment reports, and continued transmission of account string data to external reporting tools.	Baseline				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response <small>(Comply, Partial, Do Not Comply)</small>	Out of the Box Solution <small>(Y/N)</small>	Included in Price <small>(Y/N)</small>	Comments/Notes <small>Explain how the software and solution achieves the business outcome</small>
1	Billing and Rates	Manage complex billing relationships group billing, Master Meters, subtractive meters, etc.	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that, at a minimum, preserves and enables the utility's current ability to manage complex billing relationships and specialized billing scenarios—including (but not limited to) group/master billing, master meters, subtractive meters, multi-meter aggregation, customer-owned meters, and contract/rider-based billing.	Baseline				
2	Billing and Rates	Manage complex billing relationships group billing, Master Meters, subtractive meters, etc.	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that reduces or eliminates reliance on external spreadsheets, manual usage entry, and manual invoice creation by supporting automated meter read ingestion, configurable billing calculations, and auditable end-to-end billing processing within CCS.	Should Have				
3	Billing and Rates	Manage complex billing relationships group billing, Master Meters, subtractive meters, etc.	The Provider shall configure Oracle CCS Medium rates to ensure that rate calculations are accurately aligned with the applicable tariff, supporting current and future growth in medium-rate offerings.	Baseline				
4	Billing and Rates	Manage complex billing relationships group billing, Master Meters, subtractive meters, etc.	The Provider shall provide reporting and/or automated workflow capabilities within Oracle CCS to identify and correct Medium Coincident Peak accounts that may be billed under an incorrect rate due to default Service Agreement configuration.	Could Have				
5	Billing and Rates	Produce billing reports	The Provider shall provide CCS functionality that fully supports and preserves the utility's existing end-to-end billing reporting and exception management capabilities, including the ability to produce, automate, and analyze all operational, pre-bill, post-bill, and cycle-based billing reports currently generated from data using reporting (Financial Data Intelligence- FDI) and To Do-driven exception frameworks.	Baseline				
6	Billing and Rates	Produce billing reports	Provider shall propose and implement AI-assisted or advanced analytics capabilities available within Oracle CCS and/or approved integrated platforms to support enhanced analysis, anomaly detection, trend identification, and prioritization of billing reports and To Do-based exceptions across operational, pre-bill, post-bill, and cycle-based billing activities.	Could Have				
7	Billing and Rates	Produce billing reports	The Provider shall provide Oracle CCS functionality to monitor, report on, and validate billing production and cycle execution in real time and batch processing.	Baseline				
8	Billing and Rates	Produce billing reports	The Provider shall provide pre-bill validation reporting and controls that identify billing readiness issues prior to cycle billing.	Baseline				
9	Billing and Rates	Produce billing reports	The Provider shall provide comprehensive billing exception and error reporting integrated with CCS To Do and exception frameworks.	Baseline				
10	Billing and Rates	Produce billing reports	The Provider shall provide reporting and analytics to identify usage, meter data, and rate calculation anomalies that impact billing accuracy.	Baseline				
11	Billing and Rates	Produce billing reports	The Provider shall provide post-bill financial and reconciliation reporting that supports revenue integrity, auditability, and downstream financial processing.	Baseline				

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12	Billing and Rates	Produce billing reports	The Provider shall analyze the current Oracle Customer Cloud Service (CCS) configuration and recommend a best-practice solution, and where feasible configure the solution, to prevent non-metered Service Agreements (SAs) from transitioning to a Stopped status when a related metered service has a pending or unworked Disconnect for Non-Payment Field Activity.	Should Have				
13	Billing and Rates	Produce billing reports	The Provider shall configure Validation, Estimation, and Editing (VEE) rules within Oracle CCS to support rate-specific usage validation thresholds, including the ability to generate exceptions when usage exceeds a defined percentage over an established average.	Baseline				
14	Billing and Rates	Produce billing reports	The Provider shall configure Oracle CCS to support FPWC internal utility billing scenarios (i.e., where the utility is the customer) such that rate calculation and billing exception processing do not ALWAYS automatically clear or zero out charges that are required to post to Oracle Fusion and be captured in the General Ledger (GL).	Should Have				
15	Billing and Rates	Manage Invoice Production (Print, Mail and Digital)	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that fully supports and, at a minimum, preserves the utility's current end-to-end invoice production and distribution capabilities, including automated bill file generation and nightly processing, third-party print and mail provider integration, electronic bill delivery, bill image storage, operational exception handling, and support for existing billing cycle structures, processing windows, and Provider-driven review workflows.	Baseline				
16	Billing and Rates	Manage Invoice Production (Print, Mail and Digital)	The Provider shall evaluate, recommend, and implement the most appropriate use of Oracle CCS base billing cycle window capabilities, including whether extending the billing window beyond a single day is the optimal solution, to ensure sufficient time for Field Services to resolve meter reading exceptions and for Billing to review and address billing system exceptions prior to bill finalization and release.	Should Have				
17	Billing and Rates	Manage Invoice Production (Print, Mail and Digital)	The Provider shall configure Oracle CCS to apply a consolidated Billing Banking calendar that incorporates both standard bank holidays and utility-defined (PWC) holidays when calculating and assigning bill due dates.	Baseline				
18	Billing and Rates	Generate invoice files	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that is consistent with the utility's current CIS invoice generation and bill lifecycle processes, including the ability to generate invoice files beginning with meter read ingestion, followed by bill calculation and creation, and assignment of customer due dates approximately 25 days after bill generation.	Baseline				
19	Billing and Rates	Calculate Invoices for specific customers	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that fully supports and, at a minimum, preserves the utility's current ability to accurately calculate invoices for specific customers using complex rate structures, riders, taxes, and assessments, including specialized scenarios such as time-of-use billing, economic development riders, lighting charges, non-standard rate assignments (e.g., REPS), state-specific taxes, and lien-based assessments, with rates applied based on historical usage, service and premise attributes, and regulatory requirements.	Baseline				
20	Billing and Rates	Calculate Invoices for specific customers	The Provider shall provide a base solution to address the utility's current reliance on external spreadsheets and manual processes for tracking Assessments and Liens, including functionality to support centralized creation, maintenance, and ongoing visibility of lien-related data.	Should Have				
21	Billing and Rates	Manage Final bill processing, from final read to final bill batch	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that fully supports and, at a minimum, preserves the utility's current end-to-end final bill processing capabilities, including the ability to generate, validate, and complete final bills from final meter read through final bill batch execution.	Baseline				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
22	Billing and Rates	Manage Final bill processing, from final read to final bill batch	The Provider shall provide functionality within Oracle CCS to support final billing of same-day Start and Stop transactions for a single premise and customer, including short-term use scenarios (e.g., landlord inspections or cleaning), with accurate calculation, billing, and posting of partial-day usage (less than one full day) using time-stamped meter readings where available, without requiring manual read adjustments or charge corrections.	Baseline				
23	Billing and Rates	Manage Final bill processing, from final read to final bill batch	The Provider shall configure Oracle Customer Cloud Service (CCS) to accurately determine and apply the correct effective date and time stamp for disconnection and final billing events associated with Credit and Collection Disconnection for Non-Payment, ensuring alignment with allowable billing and meter read windows and preventing downstream billing exceptions or manual intervention when a Service Agreement progresses through final billing due to non-payment of disconnected balances.	Baseline				
24	Billing and Rates	Update and manage rates, tariffs and/or price changes	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that fully supports and, at a minimum, preserves the utility's current ability to update, manage, and implement rates, riders, and price changes, including creation of new rates through duplication of existing rate structures, updates to bill factors for annual rate changes, and effective-dated rate management.	Baseline				
25	Billing and Rates	Update and manage rates, tariffs and/or price changes	The Provider shall propose and implement an Oracle Customer Cloud Service (CCS)-based solution to enable automated billing for special or exception billing scenarios currently managed outside the CIS (e.g., backflow compliance, bulk/hydrants, Dental Relief, VA Billing – Ft. Bragg, grease). Note: Any proposed configuration or implementation of these scenarios within Oracle CCS shall be subject to the utility's review, approval, and prioritization.	Baseline				
26	Billing and Rates	Create and manage Miscellaneous Billing scenarios	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to manage miscellaneous billing, including deposits, adjustments, fees, credits, interest, and surcharges, whether system-generated or manually initiated with appropriate approvals, To Dos, Customer Contacts, and auditability to ensure accurate and compliant billing.	Baseline				
27	Billing and Rates	Create and manage Miscellaneous Billing scenarios	The Provider shall provide functionality within Oracle CCS to automate the creation and application of Sanitary Sewer Surcharge (EV Protect) credits, eliminating the need for manual billing adjustments currently initiated outside of the CIS.	Could Have				
28	Billing and Rates	Create and manage Miscellaneous Billing scenarios	The Provider shall provide functionality within Oracle CCS to capture and store the number of consumptive units associated with a billing adjustment applied to a Service Agreement when usage is a factor in the increase or decrease calculation.	Could Have				
29	Billing and Rates	Create and manage billing cycles and the billing schedule	The Provider shall configure Oracle Customer Cloud Service (CCS) to fully support and, at a minimum, preserve the utility's current functionality for creating, managing, and maintaining Bill Cycles and Bill Schedules, including existing cycle assignments, billing frequencies, processing windows, and scheduling logic required for bill calculation, completion, and bill batch processing.	Baseline				
30	Billing and Rates	Create and manage billing cycles and the billing schedule	The Provider shall provide or recommend a tool or configurable solution within Oracle CCS to automatically generate billing and/or meter reading schedules based on defined parameters, with the ability for users to review and modify generated schedules as needed.	Could Have				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
31	Billing and Rates	Manage incorrect billing issues/apply financial adjustment	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that fully supports and, at a minimum, preserves the utility's current ability to resolve incorrect billing through bill cancellation, cancel-and-rebill processing, back billing, and financial adjustments, including service agreement back-dating, catch-up billing, one-day billing corrections, and back billing for flat-rate and non-metered services when charges were billed to the wrong customer or service agreement.	Baseline				
32	Billing and Rates	Manage incorrect billing issues/apply financial adjustment	If late fees and/or late interest charges are required to be canceled when an associated bill segment is canceled, the Provider shall configure Oracle CCS to automatically cancel or reverse applicable late fees and late interest charges upon cancellation of the related bill segment, without manual intervention.	Could Have				
33	Billing and Rates	Troubleshoot/correct off cycle bills/re-bills	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that fully supports and, at a minimum, preserves the utility's current ability to troubleshoot, correct, and reprocess off-cycle bills and re-bills, including cancel-and-rebill processing, corrected or estimated meter reads, meter exchanges, and billing adjustments required to resolve metering errors, data issues, and usage anomalies.	Baseline				
34	Billing and Rates	Troubleshoot/correct off cycle bills/re-bills	The Provider shall propose and implement an AI-assisted or advanced analytics solution available within Oracle CCS and/or approved integrated platforms to support analysis, troubleshooting, and efficient resolution of off-cycle bills and re-bills by identifying root causes, recognizing patterns and recurring issues, and recommending corrective actions for cancel-and-rebill processing, corrected or estimated meter reads, meter exchanges, and billing adjustments associated with metering errors, data issues, and usage anomalies.	Could Have				
35	Billing and Rates	Troubleshoot/correct off cycle bills/re-bills	The Provider shall leverage Oracle CCS letter templates or attachment functionality to ensure billing correction letters sent to customers are fully traceable and visible within the CIS.	Could Have				
36	Billing and Rates	Process invoice exceptions	The Provider shall configure Oracle CCS to maintain the utility's existing invoice exception handling functionality currently supported in C2M, without loss of visibility, control, or workflow capability.	Baseline				
37	Billing and Rates	Assess a security deposit and confirm it has been paid	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that preserves the utility's current ability to assess security deposit requirements and record and confirm security deposit payments.	Baseline				
38	Billing and Rates	Bill simulation	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that preserves rate check and billing pre-calculation validation capabilities, including support for rate testing and TOU comparisons.	Baseline				
39	Billing and Rates	Design a new bill statement - leading practices	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality preserves the ability to configure and manage customer bill presentation, including bill templates, layout, sections, and content, consistent with the utility's current billing and invoice design capabilities.	Baseline				
40	Billing and Rates	Approvals required for adjustments	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that preserves the utility's current role-based user access and approval profiles for billing activities, including the calculation and approval of courtesy adjustments, rebate approvals, routing and review of billing-related to-dos, and authorized overrides of budget billing system-calculated amounts.	Baseline				
41	Billing and Rates	Approvals required for adjustments	The Provider shall configure Oracle CCS with a dedicated security role that enables authorized users to override budget controls while eliminating the need for shared logins or session changes to obtain elevated permissions.	Should Have				
42	Billing and Rates	Seasonal, annual, bi-annual billing (EX: FOG disposal charge)	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that preserves the utility's ability to support seasonal, annual, and bi-annual billing cycles, including support for specialty services that are currently billed annually outside of the CIS	Baseline				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
43	Billing and Rates	Create/ Manage service agreements	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that preserves the utility's current ability to system generate and manage service agreements, monitor billing frequency, prevent unintended charges (such as late fees during bill freezes), ensure accurate service agreement start and stop alignment across multiple services, and support automated, exception-based billing consistent with existing CIS controls and regulatory requirements.	Baseline				
44	Billing and Rates	Create/ Manage service agreements	The Provider shall configure Oracle CCS to ensure that final reads use an accurate and valid effective time stamp that aligns with the allowable billing/read window, preventing downstream billing exceptions and manual intervention.	Baseline				
45	Billing and Rates	Ability to charge miscellaneous charges to a non-utility account	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that preserves the utility's ability to assess and manage miscellaneous charges for non-utility accounts, including support for future integration or transition of billing execution to Oracle Fusion.	Baseline				
46	Billing and Rates	Peak estimation rules	The Provider shall configure Oracle Customer Cloud Service (CCS) to support Utility-defined peak estimated usage calculation rules, including configurable inputs, seasonal/period logic, and exception handling, to ensure accurate peak-related usage estimates when actual reads are unavailable or incomplete.	Should Have				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response <small>(Comply, Partial, Do Not Comply)</small>	Out of the Box Solution <small>(Y/N)</small>	Included in Price <small>(Y/N)</small>	Comments/Notes <small>Explain how the software and solution achieves the business outcome</small>
1	Credit and Collections	Manage process and actions for accounts past the due date without manual tracking and execution of notifications	The Provider shall provide Oracle Customer Cloud Service (CCS) functionality that preserves the utility's current ability to manage delinquent accounts through a combination of scheduled and ad hoc collection activities, including notice generation, late fee assessment, customer communication logging, exclusion handling, service disconnection processing, escalation, and reporting, consistent with existing CIS based collection practices.	Baseline				
2	Credit and Collections	Manage process and actions for accounts past the due date without manual tracking and execution of notifications	The Provider shall configure Oracle Customer Cloud Service (CCS) to automate the severance and shutoff process for sewer-only service accounts. When a sewer-only account reaches the Utility-defined delinquency/severance dollar threshold, the system shall automatically evaluate the presence of an installed elder valve and generate the appropriate Field Activities (FAs) without manual intervention.	Should Have				
3	Credit and Collections	Manage process and actions for accounts past the due date without manual tracking and execution of notifications	The Provider shall configure Oracle Customer Cloud Service (CCS) to support a system-level indicator that identifies the presence of an elder valve, configurable at the device level (preferred), service point level, or account level, and available for operational visibility and downstream processing.	Should Have				
4	Credit and Collections	Manage process and actions for accounts past the due date without manual tracking and execution of notifications	The Provider shall implement and configure Oracle Customer Cloud Service (CCS) with a system-level indicator to accurately identify the presence of an installed elder valve for sewer-only service accounts. This indicator shall be used to support automated delinquency, severance, and Field Activity decisioning.	Should Have				
5	Credit and Collections	Manage process and actions for accounts past the due date without manual tracking and execution of notifications	The Provider shall configure Oracle Customer Cloud Service (CCS) to support automated reconnection for sewer-only service accounts, contingent upon successful integration with the Utility's WACS system, such that upon full payment of the outstanding delinquent balance the system automatically evaluates reconnection eligibility and generates a re-connect Field Activity without manual monitoring, validation, or initiation.	Should Have				
6	Credit and Collections/Customer Programs	Manage process and actions for accounts past the due date without manual tracking and execution of notifications	The Provider shall configure Oracle Customer Cloud Service (CCS) to automatically generate a To-Do for Area Lights accounts upon reaching the delinquency threshold and to automatically close the To-Do upon full payment of the delinquent balance, eliminating unnecessary manual follow-up and improving operational efficiency.	Could Have				
7	Credit and Collections	Process return payments/charge backs	The Provider shall configure Oracle CCS functionality that preserves the utility's current ability to identify, process, and record returned payments and chargebacks across all payment channels, including manual handling, automated fee assessment, account balance updates, and customer notification consistent with existing CIS processes.	Baseline				
8	Credit and Collections	Process return payments/charge backs	The Provider shall configure Oracle CCS functionality to automate the processing of eBox chargebacks/returns, including automatic transaction posting, fee assessment, and exception workflow creation where required.	Should Have				
9	Credit and Collections	Process return payments/charge backs	The Provider shall configure functionality within Oracle CCS to automatically generate and issue customer correspondence when payment exceptions occur, including but not limited to returned payments, payment reversals, and chargebacks.	Baseline				
10	Credit and Collections	Process return payments/charge backs	The Provider shall provide configurable controls within Oracle CCS (and integrated payment channels) to identify customers with a history of chargebacks/returns and enforce payment channel eligibility restrictions accordingly.	Baseline				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
11	Credit and Collections	Manage process for unpaid debt (after disconnect)	The Provider shall configure Oracle CCS functionality that preserves the utility's current ability to manage unpaid debt following account finalization, including system generated write off triggers, customer notification, balance transfers, manual tracking of write off actions, and escalation to collections agencies in accordance with existing timelines and controls.	Baseline				
12	Credit and Collections	Manage process for unpaid debt (after disconnect)	The Provider shall configure and implement Oracle Customer Cloud Service (CCS) to replace the Utility's current manual, spreadsheet-based tracking of accounts undergoing the write-off process with a structured, system-based tracking mechanism, such as Case Management or an equivalent CIS workflow, including support for role-based access controls.	Baseline				
13	Credit and Collections	Manage process for unpaid debt (after disconnect)	The Provider shall configure Oracle CCS to support automated generation and issuance of write-off-related customer correspondence using configurable letter templates, with correspondence triggered by defined write-off events, status changes, or workflow steps within CCS.	Baseline				
14	Credit and Collections	Manage process for unpaid debt (after disconnect)	The Provider shall configure Oracle Customer Cloud Service (CCS) to automatically create and maintain a customer contact record when write-off correspondence is generated or issued, capturing, at a minimum, the communication date, delivery method, and correspondence content to support auditability and customer communication history.	Baseline				
15	Credit and Collections	Calculate and assess additional security deposits	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to assess additional security deposits based on delinquency patterns, calculate required deposit amounts, create deposit related service agreements, and apply deposits through existing customer service initiated processes.	Baseline				
16	Credit and Collections	Calculate and assess additional security deposits	The Provider shall provide functionality within Oracle CCS to automatically generate and issue customer correspondence when a deposit is assessed on an account.	Could Have				
17	Credit and Collections	Manage process for non payment disconnections	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to execute non payment disconnections using established automated and manual collection routines, including balance threshold evaluation, field activity creation, payment posting interaction, and exception handling.	Baseline				
18	Credit and Collections	Manage process for non payment disconnections	The Provider shall provide analysis and recommendations for improving automation of reconnect processing in scenarios where a customer payment and a disconnect field activity occur within the same processing window.	Should Have				
19	Credit and Collections	Manage Process for reconnection related to a disconnect for non pay	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to manage reconnections following non payment, including payment evaluation, reconnect order generation, fee application when required, and coordination with metering and field service systems.	Baseline				
20	Credit and Collections	Manage deferred payment options (payment plans and arrangements)	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to create, monitor, and enforce payment plans and payment arrangements, including eligibility rules, cancellation logic, supervisor approvals, delinquency handling, and related billing impacts.	Baseline				
21	Credit and Collections	Manage deferred payment options (payment plans and arrangements)	The Provider shall describe enhanced or configurable capabilities within Oracle Customer Cloud Service (CCS) that enable flexible or prioritized automated allocation of payment arrangement amounts across multiple Service Agreements (SAs), including rule-based allocation logic or exception handling.	Should Have				
22	Credit and Collections	Manage deferred payment options (payment plans and arrangements)	The Provider shall provide functionality within Oracle CCS to ensure that when a customer fails to comply with the terms of a payment arrangement or payment plan, any deferred or restructured debt is returned to its original delinquency aging buckets.	Should Have				

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23	Credit and Collections	Process walk in payments/Cashiering	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to accept, post, and balance walk in payments across cashiering channels, including cash, check, money order, kiosk, and non account payments, using existing cashiering controls.	Baseline				
24	Credit and Collections	Manage payment postings for charges not recorded within system	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to support payment posting for non utility or non standard charges during the transition of such billing activities out of the CIS, without loss of existing processing capability.	Baseline				
25	Credit and Collections	Perform Write-offs	The Provider shall provide Oracle CCS functionality that preserves the utility's current write off processes, including system generated write off identification, customer notification, balance transfers, service agreement creation, post write off payment handling, and coordination with external collections.	Baseline				
26	Credit and Collections	Perform Write-offs	The Provider shall provide configurable, rules-based controls within Oracle CCS to automatically identify and exclude ineligible accounts from collections agency referral (i.e. accounts in bankruptcy, deceased).	Should Have				
27	Credit and Collections	Perform Write-offs	The Provider shall configure and implement Oracle Customer Cloud Service (CCS) to automate write-off calculations and generate a write-off proposal within a workflow for manual review and approval, and upon approval to automatically create the required Accounts Receivable and General Ledger write-off entries and update the customer's account and collections status accordingly.	Should Have				
28	Credit and Collections	Manage Payment Processing (ACH, Lockbox, Cashier, auto-pay, credit cards, etc.)	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to process payments across all supported channels, including ACH, lockbox, cashiering, kiosks, auto pay, credit cards, bulk files, and real time integrations, with appropriate posting and reconciliation controls.	Baseline				
29	Credit and Collections	Find and Apply Missing Payments	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to identify, research, correct, and reapply misapplied or unmatched payments, including suspense account handling, and payment transfers.	Baseline				
30	Credit and Collections	Find and Apply Missing Payments	The Provider shall configure Oracle Customer Cloud Service (CCS) to provide automated comparison and reconciliation reporting that validates payments received from external sources (e.g., eBox, bulk/lockbox files, or payment processor notifications) against payments successfully posted in Oracle CCS.	Should Have				
31	Credit and Collections	Find and Apply Missing Payments	The Provider shall provide exception reporting within Oracle CCS to identify and track payment processing exceptions, including but not limited to payments posted to suspense, rejected or not applied payments, and payments applied with discrepancies (e.g., amount, date, or reference mismatches).	Should Have				
32	Credit and Collections	Find and Apply Missing Payments	The Provider shall configure Oracle CCS to support automated customer communications, using configurable templates and preferred delivery methods, triggered by defined payment exceptions or reconciliation outcomes.	Should Have				
33	Credit and Collections	Manage Bankruptcy filings	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to support bankruptcy processing, including account segmentation, balance transfers, post petition monitoring for all applicable bankruptcy types.	Baseline				
34	Credit and Collections	Manage Bankruptcy filings	The Provider shall provide functionality within Oracle CCS to support an automated dashboard and/or scheduled report that identifies all accounts with a bankruptcy status.	Could Have				
35	Credit and Collections	Update and maintain customer's credit rating	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to automatically calculate, assign, and maintain a customer's credit rating based on Utility-defined criteria and events, with the ability for authorized users to manually override the credit rating when required.	Baseline				

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36	Credit and Collections	Update and maintain customer's credit rating	The Provider should provide configurable rules and controls within Oracle CCS to support audit-tracked manual credit rating overrides, including reason codes, effective dates, role-based authorization, and automated re-evaluation of the credit rating based on subsequent account activity.	Should Have				
37	Credit and Collections	Apply payments and partial payments via priorities, apply payments to multiple accounts	The Provider shall provide Oracle CCS functionality that preserves the utility's current ability to accept full, partial, and multi account payments and apply them according to established service agreement and balance priority rules.	Baseline				
38	Credit and Collections	PCI Compliance	The Provider shall provide Oracle CCS functionality that preserves the utility's current PCI compliance controls, including role based masking of sensitive personal data and secure handling of payment and credit information.	Baseline				
39	Credit and Collections	Integration with Fusion	The Provider shall provide Oracle CCS functionality that preserves the utility's current integration with Oracle Fusion, including the exchange of refund, payment, adjustment, and customer data necessary to support financial processing and reconciliation.	Baseline				
40	Credit and Collections	To Dos	The Provider shall configure Oracle Customer Cloud Service (CCS) functionality with dedicated To Do types and assigned security roles to support Credit and Collections processes, ensuring appropriate task routing, visibility, and segregation of duties from other business functions.	Baseline				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response (Comply, Partial, Do Not Comply)	Out of the Box Solution (Y/N)	Included in Price (Y/N)	Comments/Notes Explain how the software and solution achieves the business outcome
1	Metering and Field/Customer Programs	Set up a new premise/account/brand new meter set	The Provider shall configure Oracle Customer Cloud Service (CCS) to support the creation of new premises, accounts, service points, and device installations, including integration with field service systems for completion of install activities and capture of installed device and inventory attributes as performed today.	Baseline				
2	Metering and Field	Set up a new premise/account/brand new meter set	The Provider shall provide and configure an integration between Oracle Field Services (OFS) and Oracle CCS to enable automatic completion of device installation processing .	Should Have				
3	Metering and Field	Set up a new premise/account/brand new meter set	The Provider shall provide functionality within Oracle CCS to ensure that a meter's multiplier is correctly populated and enforced for billing at the appropriate point in the device lifecycle to prevent zero consumption billing caused by an unpopulated or default multiplier value.	Should Have				
4	Metering and Field	Schedule and Dispatch field work requests	The Provider shall provide Oracle CCS functionality that supports the creation, routing, and dispatch of field work requests through integrated field service systems based on existing assignment logic, device requirements, and location attributes, consistent with current operations.	Baseline				
5	Metering and Field/Customer Programs	Schedule and Dispatch field work requests	The Provider shall configure Oracle CCS to ensure that Field Activities associated with non-metered Service Points (including but not limited to area lighting and flat-rate sewer services) are successfully generated, assigned, and routed to the correct work area or work group without system errors.	Should Have				
6	Metering and Field/Customer Programs	Create and Update Service Requests	The Provider shall configure Oracle CCS to support the creation and update of service requests and related field activities, including start, stop, transfer, enable, and meter-related requests, while maintaining current handling of scheduling changes, pending activity statuses, and integration timing with metering and field systems.	Baseline				
7	Metering and Field	Create and Update Service Requests	The Provider shall configure Start, Stop, Transfer, and back-to-back processing for smart meters within Oracle CCS to ensure that a valid meter reading corresponding to the Service Agreement (SA) effective date is obtained and applied prior to transaction completion.	Baseline				
8	Metering and Field	Create and Update Service Requests	The Provider shall configure Oracle CCS Field Activity functionality for non-residential services with kW requirements to support structured capture of kW readings during start, stop, and new installation activities.	Should Have				
9	Metering and Field	Create and Update Service Requests	The Provider shall provide configuration options within Oracle CCS to control the display order of Field Activity types when manually creating a Field Activity.	Should Have				
10	Metering and Field	Create and Update Service Requests	The Provider shall configure Oracle Customer Cloud Service (CCS) landlord reversion processing to ensure that when tenant stop and landlord start transactions are created as back-to-back requests with the same future effective date, the associated Service Agreement(s) and Field Activity(ies) are not prematurely released or completed prior to the scheduled effective date.	Should Have				
11	Metering and Field	Manage analysis of data for metering and field operations (reporting)	The Provider shall ensure Oracle CCS continues to support access to metering and field-related data required for operational analysis and reporting, including usage, interval, and billing data currently used by business users.	Baseline				
12	Metering and Field/Customer Programs	Manage analysis of data for metering and field operations (reporting)	The Provider shall implement an Oracle Customer Cloud Service (CCS) solution that supports automated calculation and management of BASA Rooftop Solar and Coincident Peak usage, replacing existing manual, spreadsheet-based processes performed by Customer Service Representatives (CSRs), and providing improved data accuracy, operational efficiency, and auditability.	Should Have				

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13	Metering and Field/Customer Programs	Manage analysis of data for metering and field operations (reporting)	The Provider shall provide functionality within Oracle CCS to record, manage, and track capacity information within the CIS.	Should Have				
14	Metering and Field/Customer Programs	Update Meter information/change out meter	The Provider shall configure Oracle Customer Cloud Service (CCS) to maintain the utility's current end-to-end meter change-out functionality, including initiation of field activities, removal and installation sequencing, capture of readings and attributes at the time of exchange, reassociation of devices to service points, and synchronization with billing, usage, and field activity processing as performed today.	Baseline				
15	Metering and Field/Customer Programs	Update Meter information/change out meter	The Provider will leverage Direct Measurement Processing to optimize how meter reads are processed and stored.	Baseline				
16	Metering and Field	Manage Meter inventory	The Provider shall ensure Oracle CCS maintains the utility's existing meter and device inventory management capabilities, including meter record management, attribute capture, lifecycle tracking, and device-to-service point associations.	Baseline				
17	Metering and Field	Close/update field work requests reflecting work performed	The Provider shall provide and configure Oracle Customer Cloud Service (CCS) to, at a minimum, preserve the utility's current capability to close and update field work requests based on work performed in integrated field service systems, including the receipt, storage, and availability of completion details, results, and technician notes required to fully support the field activity lifecycle.	Baseline				
18	Metering and Field	Close/update field work requests reflecting work performed	The Provider shall configure Oracle CCS to ingest device installation data from Oracle Field Services (OFS) and automatically execute all required device installation steps, resulting in auto-completion of the associated Field Activity and successful automatic activation of the Service Agreement (SA) without manual intervention.	Should Have				
19	Metering and Field	Close/update field work requests reflecting work performed	The Provider shall configure Oracle Customer Cloud Service (CCS) to support reassignment of Field Activities to the appropriate work group and seamless re-submission to integrated field systems, eliminating the need for activity cancellation or email-based coordination, and providing case- or workflow-driven automation to improve visibility, tracking, and timely customer account closure.	Could Have				
20	Metering and Field	Execute estimation routines	The Provider shall ensure Oracle CCS continues to execute usage estimation routines and support related reporting needed to identify estimated usage and support existing business review and corrective processes.	Baseline				
21	Metering and Field	Execute estimation routines	The Provider shall configure Oracle Customer Cloud Service (CCS) estimation logic to calculate usage estimates based on the customer's historical usage for the current term of service, rather than relying solely on historical usage associated with the meter or device.	Should Have				
22	Metering and Field	Review meter reading exceptions/Troubleshoot meter Field Activity failures or trouble codes	The Provider shall configure Oracle CCS to support review and resolution of meter reading exceptions, including missing, zero, or mismatched reads, and to initiate related field activities or manual corrections consistent with current troubleshooting practices.	Baseline				
23	Metering and Field	Review meter reading exceptions/Troubleshoot meter Field Activity Failures or trouble codes	The Provider shall configure Oracle Customer Cloud Service (CCS) Validation, Estimation, and Editing (VEE) rules to identify meter readings that result in negative usage and route those readings to usage and/or billing exception processing for review and resolution, without treating such readings as fatal errors during standard VEE validation.	Should Have				
24	Metering and Field/Customer Programs	Update GIS data	The Provider shall maintain Oracle CCS functionality that supports the storage, update, and exchange of geographic and location-related data (e.g., latitude/longitude) with GIS and downstream systems as performed today.	Baseline				

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25	Metering and Field	Execute field work requests	The Provider shall provide Oracle CCS capability to initiate, track, and execute field work requests through integration with field service applications, supporting end-to-end visibility of work order status consistent with current operations.	Baseline				
26	Metering and Field	Manage field work exceptions and updates	The Provider shall configure Oracle CCS to continue supporting identification, tracking, and resolution of field work exceptions, including canceled, misrouted, or incomplete activities, using current processes and system integrations.	Baseline				
27	Metering and Field	Execute field work requests	The Provider shall configure Oracle Customer Cloud Service (CCS) Service Order Management and orchestration functionality to support workflow-driven creation, routing, and management of Field Activities, including the automatic initiation of Field Activities based on defined business events, lifecycle milestones, and completion of prior orchestration steps, with the ability to route activities to appropriate work groups and manage or resubmit activities through integrated field systems such as Oracle Field Service.	Could Have				
28	Metering and Field	Upload Meter Readings	The Provider shall configure Oracle CCS to continue supporting the ingestion, storage, and processing of meter readings received from metering systems, including handling of missing, estimated, or corrected readings as performed today.	Baseline				
29	Metering and Field	Upload Meter Readings	The Provider shall configure Oracle Customer Cloud Service (CCS) to successfully ingest meter readings and accurately calculate consumption when a meter register rolls over (e.g., 99,999 to 0), including automated validation to prevent incorrect usage, or unbilled consumption.	Baseline				
30	Metering and Field/Customer Programs	Upload Meter Readings	When valid meter readings exist in RNI but are not yet available in the CIS, the Provider shall configure Oracle Customer Cloud Service (CCS) to automatically retrieve and ingest those readings from RNI into CCS to ensure accurate and timely Field Activity processing and billing.	Should Have				
31	Metering and Field	Track annual meter inspections - create service order in the CIS and track the date that it occurred	The Provider shall provide and configure Oracle Customer Cloud Service (CCS) to, at a minimum, preserve the utility's current CIS functionality supporting compliance enforcement, including the creation, management, and closure of disconnection and cut-off Field Activities for residential and non-residential customers based on non-compliance identified by the Environmental Department; end-to-end management of enforcement-related Field Activities as the system of record; billing of applicable recurring compliance-related charges (such as residential backflow fees) using Service Point characteristics; support for identification and enforcement actions associated with penalty assessments generated in external billing systems; and capture of meter change-out completion details entered through CIS Field Activities, consistent with existing business processes.	Baseline				
32	Metering and Field	Integration to Service Order Management applications for all service orders	The Provider shall configure Oracle CCS to maintain existing integrations with service order and field service management systems for all service order types, ensuring continuity of current service request and field activity processing.	Baseline				
33	Metering and Field/Customer Programs	External file batch control	The Provider shall configure Oracle Customer Cloud Service (CCS) to monitor external file upload batch processing and generate automated system alerts and/or To Dos for failed, errored, or missing file loads, with the ability to notify designated users or work groups.	Could Have				

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Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
					(Comply, Partial, Do Not Comply)	(Y/N)	(Y/N)	Explain how the software and solution achieves the business outcome
1	Integrations	Core Integration Architecture & Middleware	The Provider shall support and maintain the utility's current system integration architecture, including real-time and batch integrations between CIS and external systems using existing middleware solutions but PWC wants to move integrations from SOA to OIC wherever possible, aiming to decommission SOA and use OIC for middleware, including SFTP where possible. Must ensure continuity of all active interfaces during the transition to Oracle CCS.	Baseline				
2	Integrations	Core Integration Architecture & Middleware	The Provider shall evaluate the current integration approach and recommend whether migrating to a native Oracle-delivered integration is the preferred solution, including identification of benefits, impacts, and any required changes to existing integration processes.	Should Have				
3	Integrations	Core Integration Architecture & Middleware	The Provider shall evaluate Oracle Customer Cloud Service (CCS) AI capabilities and the Utility's current integration architecture, interfaces, and operational support processes, and shall propose and implement an AI-assisted automation approach to improve the efficiency, reliability, and timeliness of integration-related operations (e.g., monitoring, exception identification, triage, reconciliation, rerun/orchestration support, and operational reporting) using CCS data and integration telemetry available to the Utility.	Could Have				
4	Integrations	Core Integration Architecture & Middleware	The Provider will implement and integrate Oracle Data Intelligence (ODI) to unify data across customer, meter, asset, and grid domains.	Baseline				
5	Integrations	Field Operations & Work Management Integrations (WACS)	The Provider shall maintain the utility's existing two-way integration between CCS and the Workforce Automation and Customer Scheduling system, including the exchange of work requests, status updates, and completion information, using Oracle Integration Cloud (OIC) as currently implemented.	Baseline				
6	Integrations	Field Services Short-Cycle Work Integrations (OFS)	The Provider shall preserve current capabilities supporting integration with Oracle Field Service for short-cycle work, consistent with existing business processes and scoped integrations. MWM will be retired as part of the CCS implementation.	Baseline				
7	Integrations	Meter Data (RNI)	The Provider shall maintain, configure, and support an end-to-end integration between CCS and the Sensus Regional Network Interface (RNI) system to securely ingest interval meter reads, register reads, and tamper data for water, and electric services to support accurate billing, including automated ingestion, Oracle CCS-based VEE processing, exception handling, reconciliation, monitoring, and auditability consistent with current Utility operations.	Baseline				
8	Integrations	Meter Data (RNI)	The Provider shall support controlled reprocessing of meter data from Sensus RNI, including late, corrected, or replacement reads, with configurable overwrite rules, effective dating, and audit logging to prevent duplicate posting and unintended billing impacts.	Baseline				
9	Integrations	GIS Integration (ESRI)	The Provider shall maintain the utility's existing batch-based integration between CIS and GIS, including scheduled file generation and transmission of customer, premise, service point, and lighting data, and support the current process for identifying and resolving missing geocode information. GIS software may be updated in January.	Baseline				
10	Integrations	GIS Integration (ESRI)	The Utility is interested in evaluating opportunities to replace batch-based GIS integrations with more native or real-time integration patterns, where supported by Oracle CCS.	Could Have				
11	Integrations	OMS, Mapping, and Outage Communications Integration (AspenTech)	The Provider shall maintain existing integrations between CIS and Outage Management Systems (OMS), mapping solutions (including Kubra Maps), and notification platforms, including nightly data extracts used to support outage notifications and operational visibility.	Baseline				
12	Integrations	Payments - Kiosk Integration (Adcomp)	The Provider shall maintain existing API-based payment integrations that support drive-thru kiosk payments via Adcomp services, including payment submission and posting to Oracle CCS, consistent with current payment workflows, settlement, and reconciliation processes.	Baseline				
13	Integrations	Payments - IVR Integration (Payment Provider)	The Provider shall maintain existing payment integrations that support IVR payments via the contracted payment provider service, including payment submission and posting to Oracle CCS, consistent with current payment workflows, settlement, and reconciliation processes.	Baseline				
14	Integrations	Payments - Portal Integration (Payment Provider)	The Provider shall maintain existing API-based payment integrations that support customer portal payments via the contracted payment provider service, including payment submission through the customer portal and posting to Oracle CCS, consistent with current payment workflows, settlement, and reconciliation processes	Baseline				
15	Integrations	Payments - ebox Integration	The Provider shall maintain or implement an integration to accept and process inbound eBox payment files within Oracle CCS, including validation, posting to customer accounts, handling of partial or duplicate payments, and support for reconciliation and exception reporting.	Baseline				
16	Integrations	Payments - Western Union	The Provider shall maintain or implement an integration to accept and process inbound Western Union payment files within Oracle CCS, including application of payments to customer accounts, handling of unmatched payments, and support for settlement and reconciliation activities.	Baseline				
17	Integrations	Payments - Wells Fargo	The Provider shall maintain or implement an integration to accept and process inbound Wells Fargo payment files within Oracle CCS, including application of payments to customer accounts, handling of unmatched payments, and support for settlement and reconciliation activities.	Baseline				
18	Integrations	Payments - ACH	The Provider shall maintain or implement an integration to accept and process ACH payment files within Oracle CCS, including draft posting, return and reversal handling, lifecycle status management, and reconciliation processing.	Baseline				
19	Integrations	Payments - End-of-Day & Lockbox Batch Processing	The Provider shall preserve current end-of-day and nightly batch payment processing, including receipt and posting of payment files from lockbox and other external payment providers.	Baseline				
20	Integrations	IVR (NICE)	The Provider shall design, configure, and implement secure, bi-directional integration between the Utility's IVR platform and Oracle Customer Cloud Service (CCS) to enable real-time customer/account identification (AI Generated Call Summary and Real-Time Insights) and self-service transactions, including retrieval of account status and balances, payment posting, and status.	Baseline				
21	Integrations	Credit & Identity Integrations (Online Utility Exchange)	The Provider shall maintain the existing credit check integration between CIS and Online Utility Exchange, including API-based communication and current security controls, while supporting the utility's transition away from indirect portal routing.	Baseline				
22	Integrations	Portal Integrations (Vertex One/MyMeter)	The Provider shall preserve the utility's current approach to customer communication, including storage of communications in CIS and external platforms based on message type and subject matter.	Baseline				
23	Integrations	Portal Integrations (Vertex One/MyMeter)	The Utility anticipates multiple phases of customer portal enhancement before and after Oracle CCS implementation; specific Phase 2 capabilities will be defined post-implementation.	Could Have				
24	Integrations	Analytics, Reporting & Data Extracts (Sensus Analytics meter data)	The Provider shall support existing CIS data extracts, batch files, and reporting integrations used by internal teams and third-party analytics platforms, including scheduled nightly and monthly extracts.	Baseline				
25	Integrations	Analytics, Reporting & Data Extracts (Sensus Analytics meter data)	The Utility is open to future integrations supporting advanced analytics and alerting for usage data; subject to scope and prioritization.	Should Have				
26	Integrations	Analytics, Reporting & Data Extracts (Apogee/Brillion usage modeling)	The Provider shall configure and implement Oracle Customer Cloud Service (CCS) to, at a minimum, preserve and maintain the Utility's existing integration with Apogee/Brillion, ensuring no loss of current functionality and continued support for the secure exchange and use of Advanced Metering Infrastructure (AMI) data.	Baseline				
27	Integrations	Analytics, Reporting & Data Extracts (BlastPoint marketing analytics)	The Provider shall support existing CIS data extracts, batch files, and reporting integrations used by internal teams and third-party analytics platforms, including scheduled nightly and monthly extracts.	Baseline				
28	Integrations	Analytics, Reporting & Data Extracts (Biztool lien assessment data)	The Provider shall support existing CIS data extracts, batch files, and reporting integrations used by internal teams and third-party analytics platforms, including scheduled nightly and monthly extracts.	Baseline				
29	Integrations	Analytics, Reporting & Data Extracts (OMS notification extracts)	The Provider shall support existing CIS data extracts, batch files, and reporting integrations used by internal teams and third-party analytics platforms, including scheduled nightly and monthly extracts.	Baseline				
30	Integrations	Analytics, Reporting & Data Extracts (Spreadsheet server)	The Provider shall support existing CIS data extracts, batch files, and reporting integrations used by internal teams and third-party analytics platforms, including scheduled nightly and monthly extracts.	Baseline				
31	Integrations	Analytics, Reporting & Data Extracts (Spreadsheet server)	The Utility seeks a CCS-compatible solution to replace direct database access currently used by the spreadsheet server for reporting and operational extracts.	Could Have				
32	Integrations	Analytics, Reporting & Data Extracts	The Provider shall support existing CIS data extracts, batch files, and reporting integrations used by internal teams and third-party analytics platforms, including scheduled nightly and monthly extracts.	Baseline				
33	Integrations	Billing Operations Batch processing	The Provider shall ensure Oracle CCS supports the utility's current batch-driven billing operations, including meter read ingestion, bill calculation, and end-to-end billing cycles currently orchestrated through the CIS batch scheduler.	Baseline				
34	Integrations	Fusion Integrations	The Provider shall configure and implement Oracle Customer Cloud Service (CCS) to, at a minimum, preserve and maintain the Utility's existing integration with Oracle Fusion Cloud as it exists today, ensuring no loss of functionality, transaction scope, frequency, data integrity, auditability, or operational controls currently supported between the CIS and Fusion.	Baseline				

Attachment B
2.02 Business - Customer Service

Item #	Business Area(s)	Business Function/Task	What the utility desires from the new solution to achieve the project objectives	Importance	Response	Out of the Box Solution	Included in Price	Comments/Notes
35	Integrations	Backflow Compliance System Integration (SwiftComply)	The Provider shall propose and implement an integration between Oracle Customer Cloud Service (CCS) and a third-party backflow compliance system to support the exchange and synchronization of backflow device, test, inspection, and compliance data, including the ability to associate backflow information to the appropriate customer account, premise, and service point within Oracle CCS.	Baseline				
36	Integrations	Bill Print (Doxim)	The Provider shall ensure Oracle CCS is integrated with Doxim to support bill print processing, including scheduled bill extract generation, Provider-required file formats, secure delivery, status monitoring, error detection, reprocessing, and auditability, while preserving all existing functionality and supporting required changes throughout the contract term.	Baseline				
37	Integrations	Bill Print (Doxim)	The Provider shall provide proactive monitoring, logging, and notification mechanisms for the Doxim bill print integration, including the automatic creation of To Do items within Oracle Customer Cloud Service (CCS) for failed transmissions, rejected records, or Provider processing errors, to improve operational visibility and exception management.	Should Have				
38	Integrations	SSO (AZ Active Directory)	The Provider shall support integration between Oracle CCS and the Utility's Active Directory to enable Single Sign-On and centralized authentication, while maintaining role-based access control, authorization, and security configuration within Oracle CCS.	Baseline				

ATTACHMENT K: PRICING AND COMMERCIAL TERMS

Fayetteville Public Works Commission Oracle CCS Implementation Project Pricing and Commercial Terms	
<p>Pricing and Commercial Terms. The PWC requires visibility into all pricing and commercial aspects impacting the cost of these services to support the PWC. Providers should include ALL pricing relevant to the Provider's proposed approach and any 3rd party products based on the desired scope.</p>	
<p>Instructions to Providers:</p>	
<p>Provider Name:</p>	<p><<PLEASE INSERT NAME>></p>
<p>Services Pricing Tab</p>	<p>Please include a breakdown of the Implementation Services pricing being proposed to support PWC's scope. Please complete all columns and rows being requested for each service item requested. Please include comments as needed to provide clarity to PWC on how the services have been priced.</p>
<p>Reports, Integration, and Customization Listing</p>	<p>Please list the detailed reports, interfaces/API's and any customizations that have been proposed and priced. PWC wishes to quantify the estimated effort for each interface, customization, and report development bucket.</p>
<p>Proposed Payment Schedule</p>	<p>Providers must complete the proposed payment schedule using a fixed-price, phase-based structure, where payments are triggered only after completion and acceptance of clearly defined deliverables (not dates or effort). The schedule must fully allocate 100% of the contract value, include any holdbacks tied to system acceptance and defect closure, and avoid upfront payments, contingencies, or time-based billing.</p>
<p>Proposed Staffing</p>	<p>Providers must provide a proposed staffing model that reflects the combined provider and FPWC resources required to implement CCS as proposed.</p>
<p>Rate Card</p>	<p>Please include an hourly rate for proposed roles for change orders/additional requested work.</p>
<p>Commercial Terms</p>	<p>The commercial terms define how the selected provider will price, structure, govern, and be held accountable for delivering the CCS implementation, ensuring PWC can evaluate proposals on an apples-to-apples basis. Their purpose is to drive transparency, reduce downstream contract negotiation time, align payments to delivered outcomes and quality (not effort), and preserve PWC's leverage by setting clear expectations for pricing, acceptance, risk, and performance upfront in the RFP process.</p> <p>Please respond to each line item in:</p> <p>Column E - If your approach can deliver the function choose COMPLY, can partially perform the Function choose PARTIAL, or cannot perform the requirement choose DO NOT COMPLY. Please provide the name of the software module that will accomplish the function, and if applicable, indicate if it has been included in your price - YES or NO and provide additional detail or commentary to help PWC better understand what functionality you are able to provide, how you will provide it and to what extent. Providing additional details and comments will be looked upon favorably.</p> <p>Column F - Indicate if this included in proposed pricing.</p> <p>Column G - Add any additional comments or assumptions to clarify response.</p>
<p>MUST-HAVE</p>	<p>These services are required for a Provider to be selected by PWC. These functions will be weighted the heaviest when evaluating the pricing and commercial terms.</p>
<p>Should-have</p>	<p>Should-have items represent services that are not required in their entirety, but would deliver meaningful value for PWC. While not mandatory, these services will be weighted heavily in the evaluation due to their potential to align with PWC objectives and drivers.</p>
<p>Could-have</p>	<p>Could-have services represent areas where PWC is seeking provider commitment beyond standard delivery expectations. While PWC recognizes these services may exceed typical scope, their inclusion demonstrates a provider's willingness to invest, partner, and go above and beyond to support project success. These services are not mandatory, but will be viewed favorably as indicators of commitment, maturity, and long-term partnership.</p>

Item #	Phase	Milestone	Deliverables	Acceptance Criteria	Price	Estimated Invoice Date	Comments/Notes
1		<i>Example - Conversion Planning</i>	<i>Define Data Retention Strategy Data Mapping Documented Data Conversion Plan</i>	<i>PWC approval of data retention strategy document and data conversion plan. Data Conversion Plan defines the objectives, assumptions, statistics, architecture, team roles, responsibilities, activities, and schedule</i>	\$30,000	Dec-26	<i>It is assumed that Provider templates will be used for data mapping and plan documentation.</i>
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Item #	Term	Importance	Response (Comply, Partial, Do Not Comply)	Included in Price (Y/N)	Comments/Notes/Proposed Alternatives
1	Provider agrees that payments will be made by milestone, upon completion and acceptance of all deliverables within the milestone. If the Provider includes a 20% holdback until system acceptance, include as a final milestone.	MUST Have			
2	The provider will enter into a fixed price contract with the utility for the implementation. The not-to-exceed fees comprises all costs to the utility during the implementation.	MUST Have			
3	The provider commits to no additional fees (including SaaS fees) during the implementation if there is an extension that is caused as a result of the provider's actions or failures.	MUST Have			
4	The utility requires continuity of resourcing from the provider during the project to achieve quality milestones. PWC prefers that the provider agrees that 20% of payments during the implementation will be withheld if resourcing commitments made are not honored.	Could Have			
5	The provider will fix their rate card for 3 years for mutually agreed project scope changes. Rate card must be by specific role (not blended).	MUST Have			
6	Provider shall propose a not-to-exceed (NTE) travel budget for encumbrance purposes; travel will be reimbursed/paid on an actual cost basis up to the NTE; based on PWC travel policy.	MUST Have			
7	Provider shall not include a separate contingency bucket within the fixed price contract value; the contract price shall be the fixed price.	MUST Have			
8	Providers may offer optional pricing discounts when they are based on clearly defined volumes or commitments, such as customer counts, transaction volumes, contract term, or scope. Any such discounts must be fully transparent and include a clear explanation of the assumptions, eligibility criteria, duration, and conditions under which the discount applies.	Could Have			
9	Provider shall propose a not-to-exceed (NTE) travel budget; travel will be reimbursed/paid on an actual cost basis up to the NTE.	MUST Have			
10	Provider agrees to comply with PWC travel policy restrictions for reimbursable expenses (e.g., disallowed items).	MUST Have			
11	Provider acknowledges that additional travel beyond the agreed NTE is Provider responsibility unless handled via approved change order (i.e., Provider manages within budget).	MUST Have			
12	Implementation services will include at least 3 months of post go-live/hypercare support.	MUST Have			
13	Provider agrees that "data conversion complete" will be defined not only by execution of conversions, but by achieving agreed data accuracy thresholds by an agreed conversion milestone (e.g., later conversion loads), tied to phase acceptance/payment.	MUST Have			
14	Provider agrees system acceptance criteria will include: go-live, successful operational billing/close capability, and no open Priority 1 or Priority 2 defects, per agreed definitions and measures.	MUST Have			
15	Provider should propose a warranty period and define warranty defect handling and closure criteria aligned to Priority 1 and 2 tickets being closed.	MUST Have			
16	Implementation services will include services to support the implementation/ integration of the Oracle solutions outlined below: B90577 - Oracle Utilities Customer Cloud Service - Billable Service Customer B90582 - Oracle Utilities Customer Cloud Service, Advanced Meter Solution - Utilities Device Data Channel per Month B110533 - Oracle Utilities Cloud Service, Additional Development Non-Production Environment - Environment B110531 - Oracle Utilities Cloud Service, Additional Functional Test Non-Production Environment - Environment B108881 - Oracle Utilities Data Intelligence, Customer Analytics - Application B108882 - Oracle Utilities Data Intelligence, Device Analytics - Application B110521 - Oracle Utilities Data Intelligence, Work and Asset Analytics - Hosted Named User B108880 - Oracle Utilities Data Intelligence, Analytics Compute - Core of Analytics Compute Capacity B108878 - Oracle Utilities Data Intelligence, Data Warehouse Compute - ECPU B108879 - Oracle Utilities Data Intelligence, Data Warehouse Storage - Tb Of Storage Capacity	MUST Have			
17	Provider acknowledges that the Oracle subscription term/clock begins in October and confirms the implementation plan and environment needs will align accordingly (including any pre-term requirements/constraints).	MUST Have			
18	Provider confirms it is responsible for staying current on Oracle roadmap and releases and ensuring solution/configuration does not block adoption of future Oracle functionality; Provider will not rely solely on PWC for roadmap awareness.	MUST Have			
19	Provider shall disclose any proprietary tools or required third-party tools proposed for delivery and state whether each is included in price or an additional cost. List any additional tools in Column F - Comments/Notes/Proposed Adjustments.	MUST Have			
20	Provider agrees that changes to key resources require execution of the change order process to include PWC approval prior to replacement.	Should Have			
21	Provider confirms which key resources will be 100% committed to the project (as defined in the proposal and governance plan).	MUST Have			
22	If the Provider uses offshore or geographically distributed resources, the Provider confirms those resources will align with PWC's working hours as needed and will clearly describe how and when they will be available to PWC's team.	MUST Have			
23	Provider indicates whether it will name key resources in the contract and treat key resource changes as a formal contract change (e.g., submit replacement resume/approval workflow).	Should Have			
24	Provider shall ensure that anyone with access to PWC systems/customer data signs NDA(s) as required by PWC.	MUST Have			
25	Provider shall define Service Level Agreements (SLA) including acknowledgement and target resolution times by severity/priority (P1/P2/etc.) and provide examples to clarify definitions.	MUST Have			
26	Provider shall propose whether penalties/service credits apply if SLA targets are missed (including how penalties are assessed, e.g., by magnitude/frequency of misses).	Could Have			
27	Provider shall provide an issue resolution process and an escalation path for critical issues (project and personnel).	MUST Have			
28	Provider shall comply with PWC's standard legal and procurement requirements, including insurance and termination requirements as outlined in this RFP, and confirm any exceptions in its response.	MUST Have			

**Fayetteville Public Work Commission
Oracle CCS Implementation Project
Services Scope**

Services Scope. PWC has defined the services required to implement the Provider's solution.

Instructions to Providers:

Provider Name:

<<PLEASE INSERT NAME>>

Implementation Services

PWC seeks standard Implementation Services as part of this project. PWC envisions the Implementation Services to be a defined set of activities delivered collectively, but led by the Provider and done so in a pre-defined and agreed to project timeline. These services are required, but PWC is open to how each provider approaches the process and the methodology to accomplish the requirements. PWC has provided the service being requested (at a high level) and has indicated their preference on who they would like to take primary responsibility for delivery of the service. Please respond to each line item as to whether you have included the Service in your price - YES or NO - and provide additional detail or commentary to help PWC better understand what services you are able to provide, how you will provide them, and to what extent. Providing additional details and comments will be looked upon favorably.

Item #	Service Type	Service Area	Service Scope Description	Responsible to Deliver	Included in Price (Y/N)	Comments/Notes Provide details on methodology and how each service is accommodated. When possible, include an estimated time frame.
1	Implementation Services	Build and Configure -	The Provider shall configure the application based on client approved design.	Provider		
2	Implementation Services	Build and Configure -	The Provider shall perform client specific modifications based on client approved design.	Provider		
3	Implementation Services	Build and Configure -	The Provider shall configure dashboards to support analysis and data insights across all key functional areas.	Provider		
4	Implementation Services	Build and Configure -	The Provider shall develop client specific interfaces/API's based on client approved design.	Provider		
5	Implementation Services	Build and Configure -	The Provider could manage third parties for integrations.	Provider		
6	Implementation Services	Build and Configure - Report	The Provider shall develop client specific reports based on client requirements and approved design.	Provider		
7	Implementation Services	Data Migration/ Conversion	The Provider shall provide a solution that enables FPWC to access historical data beyond the converted 7-year period through a read-only database reference capability.	Provider		
8	Implementation Services	Data Migration/ Conversion	The Provider shall develop a comprehensive Data Conversion Plan including mapping and results documentation.	Provider		
9	Implementation Services	Data Migration/ Conversion	The Provider shall provide lifecycle management to maintain the mandated required amount of data.	Provider		
10	Implementation Services	Data Migration/ Conversion	The Provider shall write extraction scripts to extract the data from source systems.	Provider		
11	Implementation Services	Data Migration/ Conversion	The Provider shall identify and prioritize data cleansing requirements.	Provider		
12	Implementation Services	Data Migration/ Conversion	Performs data cleansing for source data that cannot be handled in extraction or migration.	FPWC		
13	Implementation Services	Data Migration/ Conversion	The Provider shall perform data cleansing using scripts.	Provider		
14	Implementation Services	Data Migration/ Conversion	The Provider shall provide data cleansing guidance to Utility.	Provider		
15	Implementation Services	Data Migration/ Conversion	The Provider shall load the data into the application(s).	Provider		
16	Implementation Services	Data Migration/ Conversion	The Provider shall provide a solution that enables migration of the required historical data into application.	Provider		
17	Implementation Services	Data Migration/ Conversion	The Provider shall obtain approval from FPWC on final data migration results prior to Go-Live/Cutover, to include comparison results of source	Provider		
18	Implementation Services	Data Migration/ Conversion	The Provider shall translate the data into load ready format (may include data cleansing rules).	Provider		

Item #	Service Type	Service Area	Service Scope Description	Responsible to Deliver	Included in Price (Y/N)	Comments/Notes Provide details on methodology and how each service is accommodated. When possible, include an estimated time frame.
19	Implementation Services	Design	The Provider shall provide a workshop schedule for design workshops with agendas.	Provider		
20	Implementation Services	Design	Provides interface specifications of existing interfaces.	FPWC		
21	Implementation Services	Design	The Provider shall conduct design workshops, leverage CCS native workflow capabilities, and identify gaps in business processes from industry best practices for end to end processes.	Provider		
22	Implementation Services	Design	Schedules workshops and ensures the correct participants attend.	FPWC		
23	Implementation Services	Design	The Provider shall provide architecture diagram for final integrations with CIS.	Provider		
24	Implementation Services	Documentation	The Provider shall provide system reference guides, materials, documentation of the system and processes.	Provider		
25	Implementation Services	Documentation	The Provider shall document client specific configurations and modifications.	Provider		
26	Implementation Services	Documentation	The Provider shall document client specific technical design - end to end functionality documentation and seek signoff on deliverable approval.	Provider		
27	Implementation Services	Documentation	The Provider shall provide system release notes ahead of release.	Provider		
28	Implementation Services	Documentation	The Provider shall provide user documentation and training materials.	Provider		
29	Implementation Services	Documentation	The Provider will provide Oracle CCS business process documentation.	Provider		
30	Implementation Services	Environment Management	The Provider shall provide recommended network configuration advice.	Provider		
31	Implementation Services	Environment Management	The Provider shall perform infrastructure sizing and provides infrastructure recommendations.	Provider		
32	Implementation Services	Environment Management	Procure/provision infrastructure/infrastructure services for development, testing, production and for reporting/data access of a production environment.	FPWC		
33	Implementation Services	Environment	The Provider shall perform base product installation.	Provider		
34	Implementation Services	Environment Management	Performs network configuration and changes up to Provider specifications and line of demarcation.	FPWC		
35	Implementation Services	Environment Management	The Provider shall manage production and non production instances during the project, to include scheduling requests.	Provider		

Item #	Service Type	Service Area	Service Scope Description	Responsible to Deliver	Included in Price (Y/N)	Comments/Notes Provide details on methodology and how each service is accommodated. When possible, include an estimated time frame.
36	Implementation Services	Environment Management	The Provider shall manage configuration and modification across the FPWC's specific non-production instances/environments.	Provider		
37	Implementation Services	Go Live	Defines Go-Live criteria.	FPWC		
38	Implementation Services	Go Live	The Provider shall meet Go-Live Criteria.	Provider		
39	Implementation Services	Go Live	Provide support to the development of the cutover plan.	Provider		
40	Implementation Services	Go Live	The Provider shall manage system cutover.	Provider		
41	Implementation Services	Organizational Change and	Identifies, tracks and resolves organizational change impacts.	FPWC		
42	Implementation Services	Organizational Change and	The Provider shall support identification of changes and manage the change impact matrix, to include detail by role.	Provider		
43	Implementation Services	Organizational Change and	Organizational Change Management - identifies and prepares the FPWC for changes.	FPWC		
44	Implementation Services	Organizational Change and	The Provider shall conduct core team or implementation training.	Provider		
45	Implementation Services	Organizational Change and	The Provider shall conduct "Train the Trainer" training, ability to leverage schedule, agendas, attendees for end user training.	Provider		
46	Implementation Services	Organizational Change and	The Provider shall support development of end-user Readiness Assessments including templates and evaluation criteria.	Provider		
47	Implementation Services	Organizational Change and	Defines and delivers Readiness/Competency Assessment to End Users.	FPWC		
48	Implementation Services	Post Go Live Hypercare	The Provider shall provide level 2 and 3 support for no less than 3 complete end to end billing cycles (3 months).	Provider		
49	Implementation Services	Post Go Live	Performs additional end user training.	FPWC		
50	Implementation Services	Post Go Live	The Provider shall support additional End User Training post go-live.	Provider		
51	Implementation Services	Post Go Live Hypercare	The Provider shall perform defect analysis and resolution during the system acceptance period.	Provider		
52	Implementation Services	Post Go Live	Provides level one support to end users.	FPWC		
53	Implementation Services	Project	Manages the project budget.	FPWC		
54	Implementation Services	Project Management	Produces and presents weekly status reports to PWC Project Manager that includes progress update, risks, issues, and escalations.	Provider		
55	Implementation Services	Project	Supports PWC team presentations to project stakeholders.	Provider		
56	Implementation Services	Project	Provides a point of contact and process for project escalations.	FPWC		

Item #	Service Type	Service Area	Service Scope Description	Responsible to Deliver	Included in Price (Y/N)	Comments/Notes Provide details on methodology and how each service is accommodated. When possible, include an estimated time frame.
57	Implementation Services	Project Management	The Provider shall provide a traceable process that ensures requested business process improvements, features and functions are delivered.	Provider		
58	Implementation Services	Project Management	The Provider shall create and maintain the project plan in Smart Sheets.	Provider		
59	Implementation Services	Project Management	The Provider shall a dedicated project manager with Oracle CCS experience to manage resources and schedule for the duration of the project.	Provider		
60	Implementation Services	Project Management	The Provider shall create and maintain the project RAID (Risks, Actions, Issues and Decisions) log.	Provider		
61	Implementation Services	Project Management	Communicates organizational structure for the project and the stakeholders of the project.	FPWC		
62	Implementation Services	Project Management	Implements a scope change order process to monitor increases and reductions in scope and expenditure.	Provider		
63	Implementation Services	Project	Follows defined change order process.	Provider		
64	Implementation Services	Project Management	Conducts monthly steering committee meetings to communicate project health to stakeholders.	FPWC		
65	Implementation Services	Project Management	The Provider shall educate project team and stakeholders on implementation methodology and approach.	Provider		
66	Implementation Services	Project Management	Provider shall designate a Point of Contact (POC) for escalations, and FPWC shall designate a corresponding POC. All escalated issues shall be communicated between the respective POCs.	Provider		
67	Implementation Services	Project	Provider shall gain PWC approval on all deliverables.	Provider		
68	Implementation Services	System Acceptance	The Provider shall create a system acceptance criteria defined in contract that accounts for the resolution of all severity 1 defects, compliance with all specifications and requirements, and confirmation that all project artifacts (specifications, training material, and documentation, etc.) are provided.	Provider		
69	Implementation Services	System Acceptance	The Provider shall provide appropriate resources for knowledge transfer.	Provider		
70	Implementation Services	System Acceptance	The Provider shall provide level 2 support to FPWC for at least 90 days post Go-Live.	Provider		
71	Implementation Services	System Acceptance	The Provider shall provide knowledge and responsibility transfer to PWC staff using the Provider's proposed process.	Provider		

Item #	Service Type	Service Area	Service Scope Description	Responsible to Deliver	Included in Price (Y/N)	Comments/Notes Provide details on methodology and how each service is accommodated. When possible, include an estimated time frame.
72	Implementation Services	Testing	The Provider shall deliver a master test strategy/plan that defines testing phases, scope, roles/responsibilities, environments, entry/exit criteria, defect triage/escalation, and sign-off requirements.	Provider		
73	Implementation Services	Testing	The Provider shall document all test results, to include a consolidated audit of migrated data (Counts, source/target table loaded) and comparison results (target vs source) for all data domains. Artifacts must be suitable for audit, including scrips, results, reconciliations, and defect logs.	Provider		
74	Implementation Services	Testing	The Provider shall test and document error handling, retry logic, replay/reprocessing procedures, and operational recovery steps for each integration.	Provider		
75	Implementation Services	Testing	The Provider shall perform load testing to make sure CCS environment can support production loads.	Provider		
76	Implementation Services	Testing	The Provider shall perform unit testing and provide documentation.	Provider		
77	Implementation Services	Testing	The Provider shall write and execute integration test scripts.	Provider		
78	Implementation Services	Testing	The Provider shall lead integration testing.	Provider		
79	Implementation Services	Testing	The Provider shall work directly with third party applications to enable integration testing.	Provider		
80	Implementation Services	Testing	The Provider shall coordinate and execute testing with the bill print vendor, including file layout validation, control totals, duplicate suppression, rerun procedures, and delivery timelines.	Provider		
81	Implementation Services	Testing	The Provider shall define approach, perform and execute parallel testing.	Provider		
82	Implementation Services	Testing	Writes all FPWC/Utility specific user acceptance test scripts.	Provider		
83	Implementation Services	Testing	The Provider shall review and validate expected functionality defined within user acceptance test scripts.	Provider		
84	Implementation Services	Testing	Executes user acceptance testing.	FPWC		
85	Implementation Services	Testing	The Provider shall support security and access testing, including role-based access validation, least-privilege verification, segregation of duties validation, and audit logging verification for CCS and integrated components where applicable.	Provider		
86	Implementation Services	Testing	The Provider shall provide system test scenarios and scripts - Unit, Functional, Integration.	Provider		

Item #	Service Type	Service Area	Service Scope Description	Responsible to Deliver	Included in Price (Y/N)	Comments/Notes Provide details on methodology and how each service is accommodated. When possible, include an estimated time frame.
87	Implementation Services	Testing	The Provider shall provide testing support. Preferred near real time responses to support questions and testing execution.	Provider		
88	Implementation Services	Testing	The Provider shall document and resolve defects identified during testing.	Provider		
89	Implementation Services	Testing	The Provider shall utilize PWC OUTA to track testing results and progress; only automation testing scripts.	Provider		
90	Implementation Services	Testing	The Provider shall execute Regression Testing with PWC support.	Provider		
91	Implementation Services	Testing	The Provider shall utilize PWC Azure DevOps for manual test scripts and integration test scripts.	Provider		
92	Implementation Services	Testing	The Provider shall follow SLAs for testing during the implementation.	Provider		
93	Implementation Services	Testing	The Provider shall use Oracle Utilities Testing Accelerator (OUTA) for automated testing activities as directed by FPWC.	Provider		
94	Implementation Services	Testing	The Provider shall facilitate testing governance (status meetings, daily execution stand-ups during SIT/UAT/Parallel, and defect triage meetings).	Provider		
95	Implementation Services	Testing	The Provider shall log and manage defects in Azure DevOps, using access provided by FPWC.	Provider		
96	Implementation Services	Training	The Provider's training plan shall include all in scope applications and integrations, to include CCS, OUDI, and OFS.	Provider		
97	Implementation Services	Training	Conducts end-user training.	FPWC		
98	Implementation Services	Training	The Provider shall support end user training - "expert in the room".	Provider		
99	Implementation Services	Training	The Provider shall conduct application/project team training.	Provider		
100	Implementation Services	Training	The Provider shall provide application training documentation.	Provider		
101	Implementation Services	Training	The Provider should provide end-user training documentation.	Provider		

APPENDIX

NON-DISCLOSURE AGREEMENT

This Nondisclosure Agreement (“Agreement”) is made effective this _____ day of _____, 2025, by and between Fayetteville Public Works Commission, a public authority organized under the laws of the State of North Carolina with its principal place of business located at 955 Old Wilmington Road, Fayetteville, North Carolina 28302 (“PWC”), and (Vendor Name) a (Business Type) with its principal place of business at (Vendor Address) (“Vendor”)(PWC and Vendor are each a “Party” and collectively the “Parties”). In consideration of the mutual covenants contained herein, the Parties intending to be legally bound, agree as follows:

1. “Confidential Information” means all records, communications, and other information, whether written, electronic, or oral, given by one Party (“Disclosing Party”) to the other Party (“Receiving Party”) that are not subject to disclosure as a public record under North Carolina law when such information is in the possession, custody, or control of PWC, which information includes but is not limited to trade secrets, personnel records, and customer billing records. All Confidential Information shall either be marked or otherwise identified as “confidential” or be such information that a reasonable person would be expected to understand is confidential under the circumstances. Confidential Information excludes information which:

- a. Was known to Receiving Party prior to its receipt from Disclosing Party free of any obligation to keep it confidential;
- b. Is or becomes publicly available, by other than unauthorized disclosure;
- c. Is independently developed by Receiving Party without knowledge of the Confidential Information;
- d. Is disclosed to any non-agent third party by Disclosing Party without restriction;
- e. Is lawfully received from a third party whose disclosure would not violate any confidentiality or other legal obligation; or
- f. Is required to be disclosed pursuant to North Carolina law.

2. Receiving Party will: (a) protect and safeguard the Confidential Information with at least the same degree of care as it uses to protect its own Confidential Information, which will be no less than a commercially reasonable degree of care; (b) use the Confidential Information of Disclosing Party only for the purpose for which Disclosing Party provided such information to Receiving Party (“Purpose”) and for no other purpose or otherwise in any manner to Disclosing Party's detriment; (c) not disclose, publish, or furnish Confidential Information, in any manner, except to its employees, agents, attorneys, accountants or advisors (collectively “Representatives”) who (i) need to know such Confidential Information to assist Receiving Party in relation to the Purpose, (ii) are informed by Receiving Party of the confidential nature of the Confidential Information, and (iii) are subject to confidentiality duties or obligations to Receiving Party that are no less restrictive than those in this Agreement; (d) not copy Confidential Information without the written consent of Disclosing Party, unless necessary for the Purpose, and (e) be responsible for any breach of this Agreement caused by any of its Representatives. The Receiving Party shall give the Disclosing Party notice immediately upon becoming aware that any Confidential Information has or may have been disclosed or released.

3. If Receiving Party or its Representatives is requested or required by applicable federal, state or local law, including but not limited to, subpoena, civil investigative demand or similar process (collectively, a “Legal Order”), to disclose any Confidential Information, the Receiving Party will (a)

promptly notify Disclosing Party of such request, except as prohibited by law, so that Disclosing Party may seek an appropriate protective order or other remedy; and (b) provide commercially reasonable assistance to Disclosing Party in opposing such disclosure and/or obtaining a protective order or other remedy to the extent such opposition is reasonably warranted by law. If, after providing such notice and assistance as required in this Section, Receiving Party remains subject to a Legal Order to disclose any Confidential Information, Receiving Party or its Representatives, as the case may be, will disclose no more than the portion of the Confidential Information, which, on the advice of Receiving Party's legal counsel, is specifically required to be disclosed by such Legal Order. If Vendor designates information as Confidential Information, Vendor shall defend, indemnify, and hold harmless PWC, its Commissioners, officers, employees, and agents, from every claim, demand, loss, expense, cost, damage or injury,

including reasonable attorney's fees, resulting from any third party bringing an action under Chapter 132 of the North Carolina General Statutes, to the extent such may result from the decision of PWC or its staff to withhold information in accordance with G.S. 132-1.2 and this Agreement. PWC agrees to maintain the confidentiality of Confidential Information during the pendency of any such action consistent with its statutory obligations and the commitments undertaken herein.

4. The Parties agree that, upon the written request of a Disclosing Party, Receiving Party and its Representatives will promptly return to Disclosing Party or provide written certification of the destruction of all Confidential Information of Disclosing Party, including all Confidential Information contained in internal documents, without retaining any physical or electronic copy, extract or summary of any part thereof. Notwithstanding the foregoing, a Receiving Party may retain copies of Confidential Information to the extent required by law and, in addition, solely to the extent necessary for purposes of such Party's ordinary course internal document retention and backup requirements and procedures, provided that such Confidential Information will remain subject to the terms and conditions of this Agreement for so long as it is retained.

5. The Parties agree that (a) all Confidential Information disclosed under this Agreement, and all copies thereof, will be and remain the property of Disclosing Party; (b) nothing contained in this Agreement grants or implies any grant of any right, license or authority in or to the Confidential Information; and (c) neither Party will be under any legal obligation of any kind whatsoever, or otherwise be obligated to enter into any business or contractual relationship, investment, or transaction, by virtue of this Agreement, except for the matters specifically agreed to herein. THE PARTIES HEREBY AGREE THAT ALL CONFIDENTIAL INFORMATION IS PROVIDED "AS IS," AND NEITHER PARTY MAKES ANY WARRANTIES, EXPRESS, IMPLIED OR OTHERWISE, REGARDING THE ACCURACY, COMPLETENESS OR PERFORMANCE THEREOF.

6. The Parties agree that (a) money damages alone would not be a sufficient remedy for any breach of this Agreement, and that, in addition to all other remedies, each Party will be entitled to seek specific performance and injunctive or other equitable relief as a remedy for any such breach; (b) neither Party will oppose any injunctive relief sought by the other Party on the grounds of failure to prove actual damage; and (c) each Party waives any requirement for the securing or posting of any bond in connection with such remedy.

7. Either Party may terminate this Agreement at any time by providing written notice to the other Party. Notwithstanding the foregoing, the confidentiality provisions of this Agreement shall survive and continue to apply to Confidential Information in perpetuity after such Confidential Information was disclosed to Receiving Party.

8. This Agreement sets forth the entire agreement and understanding between the Parties on the subject matter hereof and supersedes all prior discussions and agreements between them. This

Agreement may not be modified or amended except in a writing signed by all Parties. This Agreement will be binding upon and will inure to the benefit of each Party hereto and its successors and assigns. Neither Party may assign its rights and obligations under this Agreement without the prior written consent of the other Party, except that upon prior written notice to the other Party, either Party may assign this Agreement to: (1) an entity that purchases all or substantially all of the equity or assets of the assigning Party; or (2) a successor entity into which the assigning Party merges or consolidates. The Parties agree that if at any time a Party elects not to assert any of its rights under this Agreement, this election will not be construed as a waiver of such Party's rights under such provision or any other provision of this Agreement, nor shall any exercise of any right or remedy hereunder preclude any other or further exercise thereof or the exercise of any other right or remedy granted herein or by law. If any provision of this Agreement is found to be unenforceable or invalid, that provision will be limited or eliminated to the minimum extent necessary so that this Agreement will otherwise remain in full force and effect and enforceable. This Agreement shall be governed by, and construed in accordance with, the laws of the State of North Carolina. Venue for any proceedings arising under or relating to this Agreement shall be in the courts serving Cumberland County, North Carolina, and Vendor consents to the exercise of personal jurisdiction over Vendor by such courts and waives all objections and defenses relating to *forum non*

conveniens and venue. All notices under this Agreement will be in writing and will be deemed to have been duly given upon receipt, if personally delivered or if sent by certified mail, return-receipt requested, postage prepaid or by a nationally recognized overnight courier service (e.g. Federal Express) to the addresses set forth on the first page of this Agreement. This Agreement may be executed in counterparts with the same effect as if the signatures to each counterpart were upon a single instrument, and all such counterparts together shall be deemed an original of this Agreement. For purposes of this Agreement, a facsimile copy or scanned copy or photocopy of a party's signature shall be sufficient to bind such party. This Agreement shall be subject to execution by electronic means in accordance with Article 40 of Chapter 66 of the North Carolina General Statutes.

IN WITNESS WHEREOF, the Parties have executed this Nondisclosure Agreement effective the date first written above.

Fayetteville Public Works Commission

Vendor Name

By: _____
Chief Officer Name and Title

By: _____

(Printed Name)

(Title)