REQUEST FOR PROPOSAL

TO PROVIDE

BUSINESS PERSONAL PROPERTY AUDITING

AND AUDIT APPEAL DEFENSE SERVICES

FOR

ALAMANCE COUNTY, NC

TAX DEPARTMENT

RFP #26-P003

RELEASE DATE: February 13, 2026

Due Date: March 20, 2026, by 2:00 PM, EDT
Purchasing Manager: Charles Bullard

BACKGROUND

The Alamance County Tax Department is seeking proposals for business personal property auditing services. A contract period of not more than 1 year (with the potential to renew annually or monthly) will be considered. Service provision may or may not be exclusive, but if not exclusive, volume or class of property will be clearly specified in the contract. Services begin not earlier than August 1, 2026. All proposals must be received by 2:00 PM, March 20, 2026.

1. INSTRUCTIONS TO BIDDERS

1.1 General Description of Work

Provide auditing services and appeal support for audits performed for a wide range of business personal property within Alamance County, North Carolina.

1.2 What Must Be Included with Bid

The bidder must provide a breakdown of all fees, a description of the work to be performed in accordance with the specifications found in this document, specified information about the company, and suggested terms of contract.

1.3 Schedule of Bid Period Activities

- A pre-bid inquiry period will extend until 3:00 PM, March 13, 2026. No further questions will be allowed after this time.
- The bid is due by 2:00 PM, March 20, 2026. Bids submitted after this date and time will be treated as inadmissible and discarded without inspection.
- The review period extends from March 20, 2026, to March 27, 2026. Clarification may be sought from the bidders to aid in selecting a service provider.

- Decision is expected by April 17, 2026 with service to begin no earlier than August 1, 2026.

1.4 Location of Work
The bidder is expected to provide their own facilities for staff. Work may be performed at the normal offices for the bidder's staff or may require that they travel to make field inspections of property under audit or appeal. Any such travel is at the bidder's expense and should be built into the fees charged, as they are considered a cost of doing business in Alamance County and may not be billed separately.

1.5 Pre-Bid Meeting
This specific contractual process will not include a pre-proposal conference.

1.6 Submittal
Submittals may be submitted by USPS mail or other delivery service to the Purchasing Director. Respondents may also bring proposals to the Alamance County Purchasing Department at the address listed in this section.

One (1) Original, two (2) copies, and one (1) electronic PDF copy on a USB flash drive of the proposal shall be sent or delivered to the Alamance County Purchasing Department by the deadline. The project name and RFP number should be listed in the lower left corner of the envelope.

If using USPS mail or another shipping/delivery service, **please use the following address**:

Charles Bullard, Purchasing Manager
Alamance County
124 W. Elm St.
Graham, NC 27253

Proposals submitted after **2:00 PM EDT on Tuesday, March 20, 2026, will not** be accepted. Emailed responses **must be in PDF format** and may be sent to: PurchasingProposals@alamancecountync.gov

1.7 Contact for Questions
Questions related to the bid process should be directed to Charles Bullard at charles.bullard@alamancecountync.gov, while questions relating to specifications of service should be directed to Brad Fowler at brad.fowler@alamancecountync.gov. All questions must be submitted in writing, and answers believed to be of benefit to other bidders will be shared with all bidders. The deadline for questions is 3:00 PM, March 13, 2026.

1.8 Basis for Bid Evaluation
The County intends to base the evaluation of the bids on important aspects such as managerial integrity and performance, as well as the cost of the service.

1.9 Ethical Standards
The bidders are expected to strictly adhere to ethical standards associated with bidding and contractual processes. Therefore, gifts and canvassing will disqualify bidders.

1.10 Proposal Format
All bidders are required to provide a schedule of their services, complete with associated fees and detailed descriptions of performance. The proposal should also include the requested information about the company and contract terms for review.

2. DESCRIPTION OF WORK

2.1 Business Personal Property Account Auditing
The County will assign accounts to the Bid Winner at the County's discretion. The Bid Winner will perform an audit on said accounts and report findings back to the County. All documentation will be provided by the Bid Winner for the County to review and endorse, and the County will not be required to draft any letters of introduction, requests for documentation, or reports of audit findings. All communication related to the auditing process from the time of audit initiation to the time of communication of findings will be conducted by the Bid Winner (apart from the County providing signatures to certain written correspondence).

2.2 Appeal Defense
The Bid Winner will provide appeal defense services beginning from the time that the audited company files an appeal on any level (including informally to the County Assessor) to the time that all appeals are concluded (potentially to the level of the NC Supreme Court). The Bid Winner will communicate with the Appellant, meet with the County and the Appellant at the County office or the Appellant's place of business to review concerns, and will provide evidence in any hearings to support the recommended valuation.

3. PROPOSAL
3.1 Breakdown of Bid Price
Due to the nature of the services sought from the bidders, bidders will provide a comprehensive breakdown of each fee that may be charged to the County to effectively execute the services. Such information enables the County to determine the scope of work covered by each item of the breakdown.

3.2 Fee Structure – Account Auditing
Acceptable bids will provide a flat fee per audit. Bidders may choose to offer varying fees depending on the scope of the auditing work (typically determined by the size of the business), as well as providing varying fees depending on whether there is a discovery (as there is more work once a discovery is found). If varying fees are utilized, the Bidder must clearly specify and define when each level of fees would be indicated.

3.3 Fee Structure – Appeal Defense
The bidder should also submit fees on a per-hour, per-day, or per-case basis for appeal defense. This may or may not include a base amount of appeal support offered at no cost to the County before proceeding to a level for which there is a fee. There may be one level of fees for all levels of appeal defense, or this may vary depending on the level of the appeal (Informal, Board of Equalization, Property Tax Commission, Court of Appeals, NC Supreme Court). If varying fees are utilized, the bidder must clearly specify and define when each level of fee would be indicated.

3.4 Fee Structure – No Additional Costs Accepted
No additional costs are to be invoiced outside of the above-referenced. All print, postage, and travel expenses should be built into any fees quoted in 3.2 and 3.3 above.

3.5 Fee Structure – Multiple Options
The bidder may choose to propose a single set of account auditing and appeal defense fees or may offer multiple options, which allows the county to select the one that best fits the County's needs. All options proposed must be submitted simultaneously as one proposal, with the differences between options clearly defined. Additional options submitted after the proposal has been made will be rejected, apart from corrections made pursuant to 3.9 below.

3.6 Not a Contingency Contract
Under no circumstances will any bid be accepted that suggests or seems to suggest any form of contingency auditing, as this is illegal in the State of North Carolina.

3.7 Additional Information to be Included in the Proposal
The bidder should submit basic information about the company, including:

- Company Name
- Location of Headquarters
- Year the company began offering auditing services
- Number of North Carolina Counties using the company
- Names of North Carolina Counties using the company

- Number of Offices in North Carolina
- Location of Offices in North Carolina
- Number of Auditors and Supporting Staff (broken out separately)
- Number of Auditors and Supporting Staff (broken out separately) in North Carolina
- Qualifications Required for Auditors
- Quality Control Procedures in Place.
- Company Vision and Mission Statements, as well as any statements of Core Principles, etc.
- List of References or Letters of Recommendation

3.8 Length of Time Bid is Valid
Once submitted, the bid will be considered valid for 90 days and must be honored if accepted. Attempting to alter service provision, fee amounts, or other terms of the bid during the post-bidding contract phase will disqualify the bidder. Notwithstanding, the exact terms of the contract may be negotiated between the County and the Bid Winner, and changes arising from requested changes in the contract will not disqualify the Bid Winner, but there may be grounds for the County to revisit its choice of Bid Winner should the contract negotiations prove unsatisfactory.

3.9 Notice of Conflicts or Errors in Bid Documents
During the process of creating and forwarding bids, some mistakes may occur, necessitating the County to be notified. Corrections should be submitted no later than 10 business days after the bid is due, or within 10 business days of a request for correction by the County. Corrections must be submitted to the Purchasing Director in writing.

3.10 Clarification of Bids
If the County requires clarification of submitted bids, the County will request such clarification in writing, and the bidder will respond in writing within 10 business days.

3.11 Bidder Signature
No proposal will be accepted unless it is signed and dated by a person lawfully authorized to enter into agreements on behalf of the bidder.