ALAMANCE COUNTY

NORTH CAROLINA

ADDENDUM NO. 2 TO REQUEST FOR PROPOSALS

Comprehensive Property Tax Software System Replacement

RFP No.: #27-P002

Original Issuing Department: Alamance County Tax Administration

Original Issuance Date: July 24, 2026

Original Proposal Due Date: September 1, 2026, by 3:00 PM

Addendum No. 1 Issuance Date: July 28, 2026

Addendum No. 2 Issuance Date: August 14, 2026

Contact Point: Alamance County Tax Administration, Alamance County Office Building, Graham, North Carolina. Email: **brad.fowler@alamancecountync.gov**

OFFICIAL SOLICITATION DOCUMENT — ALAMANCE COUNTY TAX ADMINISTRATION

This Addendum No. 2 is issued to respond to written questions received from prospective proposers regarding the above-referenced Request for Proposals, submitted by the question deadline of August 14, 2026 (RFP Section 10.4). The questions are restated in summary form and answered below. To the extent any answer modifies the RFP, the Section 6 Technical Requirements Matrix, or Addendum No. 1, this Addendum No. 2 controls. Except as expressly modified herein, all terms, conditions, and requirements of the RFP and Addendum No. 1 remain in full force and effect.

Vendors must acknowledge receipt of this Addendum using the Addenda Acknowledgment form (Appendix E to Addendum No. 1) and submit it with their proposal.

1. Proposal Forms, Response Codes, and Submission

Q1. *Addendum No. 1 requires Y, E, MN, or MC response codes, while the issued Section 6 Technical Requirements Matrix (Excel) provides columns labeled "Yes – Meets Requirement," "Yes – w/Additional Fee," "Yes – w/o Additional Fee," "No – Not Available," and "Other – Please Explain." Which response structure controls, and how should vendors enter modification delivery dates, costs, exceptions, and comments?*

County Response:

Addendum No. 1 controls. Each requirement in the Section 6 Technical Requirements Matrix must be answered using the response codes defined in Addendum No. 1, Section 1: **Y** (Yes), **E** (Exception), **MN** (Modification, No Cost), or **MC** (Modification, at Cost). The descriptive column headers in the issued Excel workbook are superseded and should not be used to indicate the response.

Vendors must enter the applicable Addendum No. 1 code in the response column and supporting detail in the "Other – Please Explain / Vendor Comments" column, as follows: for **MN**, state the committed delivery date; for **MC**, state the estimated one-time and recurring cost and the delivery date, and enter the same cost as a line item in Appendix A with a cross-reference to the requirement ID; for **E**, explain the exception. A blank response will be scored as "E."

Q2. *Must the completed Appendix A Cost Proposal Form and Technical Requirements Matrix be submitted as native Excel workbooks in addition to being included in, or accompanying, the proposal PDF?*

County Response:

Yes. In addition to the sealed submission required by RFP Section 10.2 (four (4) paper copies and one (1) PDF copy on a USB drive), vendors must include on the USB drive the completed Appendix A — Cost Proposal Form and the completed Section 6 Technical Requirements Matrix as native Microsoft Excel (.xlsx) workbooks, in the format provided. In the event of any discrepancy between a native workbook and the PDF, the native Excel workbook governs.

Q3. *The Addendum and workbook instructions state that vendors must not add or remove line items, but the "Other" rows instruct vendors to add rows above them if needed. May vendors insert additional "Other" rows for itemization?*

County Response:

Yes. Vendors may insert additional rows directly above a designated "Other" line (for example, line 1.19 on Sheet 1 and line 2.5 on Sheet 2 of Appendix A) solely to itemize additional cost items, as those rows instruct. The restriction against adding or removing line items applies to the predefined, required line items and to the overall workbook structure; it does not prohibit itemizing multiple entries under an "Other" line. Vendors must not add or delete tabs, alter formulas or the Total Cost of Ownership calculations, remove any predefined line item, or substitute a vendor-standard pricing format.

Q4. *Is September 1, 2026, at 3:00 p.m. a deadline for the County's receipt of the complete proposal, or a postmark deadline?*

County Response:

This is a **receipt (delivery) deadline**, not a postmark deadline. Per RFP Sections 10.2 and 10.3, the sealed proposal (four paper copies and one USB drive) must be received by the County no later than 3:00 p.m. on September 1, 2026. Late proposals will be rejected regardless of postmark or carrier date. Vendors are solely responsible for ensuring timely delivery to Attn: Charles Bullard, Purchasing Manager.

2. Payment Processing

Q5. *The Technical Requirements Matrix identifies credit-card and online payment processing (understood to be MuniciPay, via GovPayments, on the County's public tax-payment page). Does the County intend to retain this arrangement? If not, should proposers supply payment-processing services or integrate with another County-selected processor?*

County Response:

The County currently processes credit-card and online payments through its existing processor (MuniciPay, via GovPayments). The County is open to replacing this arrangement and invites proposers to include integrated payment-processing services as part of their proposed solution. Proposers may either:

- **Option (a) — Integrate with the existing arrangement.** Integrate the proposed system with the County's current payment processor. Integration specifications, test-environment access, settlement and reconciliation requirements, refund workflow, and the division of PCI-DSS responsibilities will be provided to the awarded vendor during implementation planning; or
- **Option (b) — Propose payment processing.** Propose the vendor's own integrated payment-processing capability, including online, credit-card, and e-check (ACH) processing.

Proposers electing Option (b) must describe: the payment-processing solution and hosting model; supported payment types and channels (online, in-office, IVR/phone, mail/lockbox, as applicable); the settlement and reconciliation workflow, including timing and integration with the County's ERP (Tyler Munis) for GL posting and daily deposit reconciliation; refund handling; the division of PCI-DSS responsibilities among the vendor, any processor, and the County; and all associated fees, including any per-transaction, convenience, or service fees and which party bears them (taxpayer-paid versus County-absorbed).

All payment-processing costs must be itemized in Appendix A — one-time integration or setup costs on Sheet 1 (line 1.10, "Integration — payment processor," or the added payment-processing line) and recurring costs on Sheet 2 (added "Payment processing" line). Convenience or per-transaction fees passed to taxpayers must be disclosed in the Notes column where they are not a direct County cost. Costs omitted from Appendix A will be deemed included in the total price.

This is an evaluated component of the solution under RFP Section 11 (Functional and Technical Fit, and Cost Proposal); the County will consider both functional fit and total cost impact, including taxpayer-facing fees.

3. Personal Property Scope and Portal Functions

Q6. *Is business account creation and maintenance an internal staff function, a secured public taxpayer-account function, or both? What must taxpayers and staff be able to do after account creation?*

County Response:

Both. Consistent with RFP Sections 5.2 and 5.6, County staff must be able to create and maintain business personal property accounts internally, and the secured taxpayer portal must allow business taxpayers to self-register, subject to staff verification and approval.

After an account is established, business taxpayers must be able to: file the annual business personal property listing electronically; upload supporting documentation (asset detail, schedules, correspondence); view account and assessment history, notices, and correspondence; and make payments. County staff must be able to create, edit, merge, deactivate, and audit accounts; review and process electronic listings; apply discoveries, penalties, and exemptions; and manage all associated correspondence and workflow.

Q7. *The RFP identifies approximately 13,000 combined business and individual personal property accounts. Please provide the categories and approximate volumes of individual personal property within that total and describe the required listing/valuation methods and annual filing, discovery, penalty, exemption, audit, and correspondence processes.*

County Response:

Of the approximately 13,000 combined personal property accounts referenced in Section 2 of the RFP, roughly **4,845** are business personal property accounts and approximately **8,155** are individual personal property accounts. The counts of individual personal property assets do not equal the number of individual accounts because a single account may include multiple items of personal property. As a result, the total number of individual assets—such as boats, aircraft, mobile homes, and vehicles—exceeds the number of accounts. Individual personal property consists primarily of the following categories and approximate volumes:

Boats and Motors: Approximately 9,453 assets

Aircraft: Approximately 106 assets

Mobile/Manufactured Homes: Approximately 6,155 assets

Untagged / unregistered motor vehicles (individual personal property): Approximately 6,686 assets. Registered motor vehicles are billed separately under the North Carolina Tag & Tax Together program and are not included here.

Listing, valuation, and administration follow the North Carolina Machinery Act (N.C.G.S. Chapter 105) and the County's adopted schedules. Business personal property is valued using trended original-cost depreciation schedules consistent with North Carolina Department of Revenue guidance, updated annually. The annual listing period runs during January with statutory extensions as provided by law. Discovery of unlisted or under-listed property is performed under N.C.G.S. § 105-312, with penalties under § 105-312(h) and multi-year discovery (back-tax) billing as applicable. Exemptions and exclusions are administered under N.C.G.S. § 105-275 et seq. The system must support the full audit and correspondence lifecycle for these processes, including secured-portal filing, notice generation, and a complete account-level audit trail.

Q8. *Does "ad-hoc reporting" (RFP Section 5.7) mean County users must design reports without vendor involvement?*

County Response:

No per-report vendor engagement is required. Ad-hoc reporting means authorized County users must be able to design, build, save, and export custom reports — selecting fields, applying filters, sorting, grouping, and creating calculated columns — without a professional-services engagement or vendor involvement for each report. Consistent with RFP Section 5.7, the capability must include export to CSV, Excel, and PDF, and, where feasible, a documented read connection to County reporting data suitable for consumption by Microsoft Power BI.

4. Document Storage and Search

Q9. *Does indexed search require full-text search inside attached documents, metadata and filename search, or both, and what document-storage integration specifications are available?*

County Response:

The County uses two document systems: **Laserfiche** as its primary document management repository, and **Microsoft SharePoint** for additional document storage and collaboration. Item 9 of the Section 6 Technical Requirements Matrix lists Laserfiche among the County's third-party applications the system must integrate with (along with ESRI, LOGAN, Autoagent, Pictometry, and others). Proposers should plan document-management integration with Laserfiche and should describe the ability to integrate with SharePoint where applicable.

Indexed search (RFP Section 5.9) must support both metadata and filename search and full-text search within the content of attached documents where the file type supports text extraction. Integration specifications for both Laserfiche (repository structure, template/metadata fields, and authentication) and SharePoint will be provided to the awarded vendor during implementation planning.

5. Security

Q10. *What evidence will the County require to demonstrate protection against OWASP-listed vulnerabilities (RFP Section 6.3) and alignment with NIST or an equivalent framework — such as independent penetration testing, vulnerability scans, SOC reports, control mappings, or certifications?*

County Response:

The County will accept a combination of the following: a current SOC 2 Type II report; results of independent third-party penetration testing performed within the preceding 12 months; recent vulnerability scan summaries; and a control mapping to the NIST Cybersecurity Framework or NIST SP 800-53 (or a documented equivalent). Recognized certifications such as StateRAMP or ISO/IEC 27001 may supplement this evidence but do not, by themselves, replace the SOC 2 Type II report and penetration test results. NIST alignment is required; the specific framework may be the NIST Cybersecurity Framework, NIST SP 800-53, or a documented equivalent.

6. Availability, Disaster Recovery, and Logging

Q11. *The RFP calls for vendor-defined RTO and RPO, annual DR testing, redundant infrastructure, 24/7 SaaS monitoring, and County IT log-review tools (RFP Sections 6.7, 6.8, 9.6). Does the County have minimum*

RTO/RPO values or additional requirements for backup retention, geographic redundancy, restoration evidence, monitoring access, log retention, or County IT log-review capabilities beyond those stated?

County Response:

Beyond the requirements already stated in the RFP, the County's minimum expectations are as follows:

- **Recovery Time Objective (RTO):** A maximum of 24 hours. The County would accept the CAMA software being unavailable for up to 24 consecutive hours.
- **Recovery Point Objective (RPO):** A maximum of 4 hours, representing the maximum acceptable data loss.
- **Backup frequency and retention:** Backup frequency and retention will differ between Software-as-a-Service (SaaS) and private-cloud deployments; SaaS solutions typically back up more frequently across geographically redundant data centers, supporting lower RTO and RPO. The County's standard is to follow applicable North Carolina State backup and records-retention requirements. Proposers must state their proposed backup frequency and retention period, which must meet or exceed those requirements.
- **Geographic redundancy:** production and backup infrastructure across at least two geographically separate regions.
- **Restoration evidence:** documented results of at least annual disaster-recovery testing, provided to the County upon request.
- **Monitoring access:** County IT read access to SaaS availability/status monitoring and alerting.
- **Log retention and access:** 90 days online / 1 year archived, with County IT ability to review or query relevant logs (RFP Section 6.8).

Vendors proposing values or capabilities less favorable than these minimums must clearly note the exception in the Section 6 Technical Requirements Matrix.

7. Data Conversion and Data Rights (OneTax)

Q12. *Please confirm that Alamance County owns or possesses the rights to access, extract, and provide all OneTax data required for conversion. Upon award, will the County furnish — or ensure its current vendor furnishes — complete, usable source extracts (current year plus at least 10 years of history), documents and attachments, schema/data-dictionary documentation, custom-field definitions, and interface specifications? Please identify any excluded data, third-party restrictions or extraction fees, which party performs and funds the extraction, and whether more than 10 years is expected.*

County Response:

The County owns its data and possesses the rights necessary to access, extract, and provide the OneTax data required for conversion. Consistent with RFP Sections 4.6 and 7 and Item 2 of the Section 6 Matrix (10 years plus current, per parcel), the County will furnish — or ensure that its current vendor furnishes — the selected vendor with complete, usable source extracts containing the current year and at least 10 years of historical data, together with available documents and attachments, schema or data-dictionary documentation, custom-field definitions, and interface specifications, and with the extraction access reasonably necessary to complete the conversion.

Excluded data / third-party restrictions / extraction fees: **None known**.

Party performing and funding extraction: **The County will coordinate the extraction with its current vendor. Any extraction cost, if applicable, will be addressed with the incumbent vendor; the County is not aware of an extraction fee at this time.**

Historical scope: The County **does not** require more than 10 years of historical data to be converted.

8. Acknowledgment of This Addendum

Proposers must acknowledge receipt of this Addendum No. 2 on the Addenda Acknowledgment & Non-Collusion Affidavit (Appendix E to Addendum No. 1) and submit it with their proposal. Failure to acknowledge an issued addendum may result in the proposal being deemed non-responsive (RFP Section 10.1).

END OF ADDENDUM NO. 2