

ALAMANCE COUNTY

NORTH CAROLINA

REQUEST FOR PROPOSALS

Comprehensive Property Tax Software System Replacement

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OFFICIAL SOLICITATION DOCUMENT — ALAMANCE COUNTY TAX ADMINISTRATION



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NOTICE OF REQUEST FOR PROPOSALS

Alamance County Tax Administration is soliciting a sealed proposal from qualified vendors to provide a modern, enterprise-grade Comprehensive Property Tax Software System. This system must support all major components of tax administration, including Computer Assisted Mass Appraisal (CAMA), real and personal property management, billing and collections, land records integration, appeals, data analytics, citizen-facing services, and all statutory processes required under the North Carolina Machinery Act.

This Request for Proposals (RFP) outlines the County's expectations for software functionality, data conversion (if needed), implementation services, system integrations, training, long-term support, cybersecurity safeguards, and hosting options. Vendors submitting proposals must demonstrate the capacity, experience, and financial strength to deliver a complete end-to-end solution.

Proposals must be submitted to **Charles Bullard, Alamance County Purchasing Manager**, no later than the deadline listed above. Late submissions will not be accepted.

Alamance County reserves the right to reject any or all proposals, waive technicalities, and award a contract deemed in the best interest of the County.

This procurement is conducted pursuant to N.C.G.S. § 143-129.8, which authorizes counties and other political subdivisions of the State to procure information technology goods and services through a request for proposals process, in lieu of the formal competitive bidding procedures otherwise required under N.C.G.S. § 143-129.



1. INTRODUCTION AND PURPOSE

Alamance County seeks to procure a fully integrated and modern enterprise property tax administration system capable of meeting the operational, statutory, and technological needs of the Tax Administration Department for the next decade and beyond. The County operates under the requirements of the North Carolina Machinery Act and must administer property taxation in a manner that is transparent, efficient, accurate, secure, and accessible to the public.

The County currently utilizes OneTax, a single enterprise platform that supports all core tax administration functions. Currently operational complexity has created a need to evaluate systems that may enhance future needs of the Tax Department:

- Enhances operational efficiency
- Improves accuracy and data transparency
- Supports advanced analytics and reporting
- Integrates seamlessly with GIS, the County's financial/ERP system, and payment processors
- Provides modern, secure, and intuitive citizen-facing portals
- Incorporates industry-standard cybersecurity protections
- Supports long-term scalability and future statutory changes
- Allows flexible hosting options including SaaS and other County-approved environments

The purpose of this RFP is to select a software vendor capable of providing:

- A fully integrated, enterprise-grade property tax platform
- Complete data migration from OneTax, if alternate vendor is selected
- Comprehensive implementation, configuration, and training services
- Secure, stable, long-term maintenance and support
- A system designed to meet all requirements of North Carolina property tax law
- A platform flexible enough to support future revaluation cycles, legislative changes, and evolving departmental needs

Vendors must demonstrate:

- Proven experience implementing property tax systems for North Carolina counties or comparable jurisdictions
- Strong financial stability
- A clear project methodology
- Robust training and change-management capabilities
- Commitment to ongoing enhancements and statutory compliance updates

Alamance County intends to enter into a multi-year agreement with the selected vendor. The initial contract term will be four (4) years, with the County retaining the option for up to two (2) additional two-year renewal periods based on performance, funding, and operational needs.



2. Background on Alamance County

Alamance County is located in the central Piedmont region of North Carolina and serves a diverse population spread across both incorporated municipalities and rural communities. The County administers a broad range of public services including public safety, social services, education support, environmental health, and general government operations. Tax Administration plays a critical role in funding these services through the equitable listing, appraisal, assessment, billing, and collection of property taxes.

Alamance County administers:

- Approximately 85,000 real property parcels
- Roughly 13,000 business and individual personal property accounts
- Annual property tax billing for all taxable property within its jurisdiction
- Regular revaluation cycles, conducted pursuant to the North Carolina Machinery Act
- Ownership transfers, parcel splits and combinations, and mapping updates in coordination with GIS and the Register of Deeds
- Appeals at the informal, board-level, and state-level (Property Tax Commission)
- Public information and taxpayer service functions

Alamance County seeks to adopt a comprehensive system that will support the accuracy, transparency, and efficiency necessary to administer property taxation for the next decade and beyond.



3. PROJECT GOALS AND MODERNIZATION OBJECTIVES

Alamance County seeks to procure and implement a next-generation enterprise Property Tax Software System that strengthens operational efficiency, ensures long-term statutory compliance, and enhances service delivery across all areas of tax administration. The County's objectives center on modernizing its current processes, leveraging technology to reduce manual workload, and improving data consistency and accessibility for both staff and citizens.

This initiative is guided by the following goals and modernization priorities:

3.1 Operational Excellence

The new system must streamline and enhance day-to-day operations by:

- Providing intuitive, configurable workflows that reduce manual entry and eliminate duplicate data handling
- Automating routine tasks such as valuation updates, notice generation, delinquency processing, and billing activities
- Improving internal productivity by offering a unified view of parcel, taxpayer, and billing information
- Supporting staff efficiency during revaluation cycles and routine annual listing periods
- Offering scalable architecture capable of supporting population growth and future workload expansion

3.2 Data Integrity, Accuracy, and Transparency

Accurate and reliable property tax information is essential to the County's fiscal stability and public trust. The new system must:

- Maintain consistent and auditable data across all modules
- Track the full lifecycle of parcels, including ownership, valuation, appeals, and billing history
- Provide real-time access to parcel records and transaction history
- Include comprehensive audit trails for every user-initiated or system-initiated change
- Support advanced reporting and analytics for internal decision-making and statutory reporting

3.3 Superior Citizen Service and Public Access

Alamance County aims to provide modern, accessible, and user-centered digital services. The replacement system should:

- Offer a secure online portal for taxpayers to view bills, make payments, manage listings, and access property information
- Provide property search tools that are intuitive and responsive on all devices
- Improve transparency related to valuation, exemptions, and tax calculations
- Reduce the need for in-person visits or phone calls by offering clear, self-service functionality

3.4 System Integration and Interoperability

A modern property tax system must function seamlessly across the County's technology environment. The new system must:



- Integrate with the County’s geographic information system (GIS)
- Interface with the County’s ERP/financial system (for receipts, GL posting, and collections reporting)
- Connect with payment processors through secure, real-time APIs
- Offer open, well-documented APIs to support future integrations
- Synchronize data between related modules with minimal latency

3.5 Cybersecurity, Stability, and Regulatory Compliance

The new system must reflect industry-standard cybersecurity practices and meet all legal and regulatory obligations. The County requires:

- Strong data encryption and multi-factor authentication
- Role-based security and comprehensive permission structures
- Compliance with all North Carolina public records and property tax statutes
- Support for regular system updates, including NC legislative changes
- A system architecture aligned with modern security frameworks and disaster recovery standards

3.6 Long-Term Sustainability and Vendor Partnership

The County seeks a vendor with a proven history of successful property tax system deployments and ongoing product evolution. The system must:

- Be supported by a vendor with financial stability and long-term viability
- Offer regular product enhancements and a clear development roadmap
- Include responsive customer service and escalation pathways
- Support future revaluation methodologies and statutory adjustments
- Encourage continuous improvement through configurable business rules and data-driven functionality



4. SCOPE OF WORK

The purpose of this Scope of Work is to define the functional, technical, operational, and service expectations for the implementation of a modern, fully integrated Property Tax Software System for Alamance County. The selected vendor shall provide a complete, enterprise-grade solution that replaces the County's existing OneTax platform if a different vendor is chosen and supports all listing, appraisal, assessment, billing, collection, and public access functions required by North Carolina law.

The vendor must supply software, implementation services, data migration, integration development, training, documentation, and long-term maintenance and support sufficient to deliver a productive, secure, and sustainable system for Alamance County Tax Administration.

4.1 Software Solution Requirements

The proposed solution must be a cohesive, unified platform that provides seamless interoperability across all major tax administration domains. At a minimum, the system must include:

- A fully integrated Computer Assisted Mass Appraisal (CAMA) module
- Real property and personal property listing and valuation components
- A complete billing and collections subsystem for annual, supplemental, and motor vehicle-related taxation
- Land records and ownership tracking functions
- Workflow tools for appeals, adjustments, exemptions, and special programs
- Internal dashboards and analytics
- A citizen-facing web portal for search, payments, and listing functions
- Secure user authentication and role-based access controls
- Systemwide audit logging and transaction history

The vendor must provide all software modules necessary to support North Carolina Machinery Act requirements.

4.2 Hosting Options

Vendors may propose one or both hosting options:

A. Software-as-a-Service (SaaS): Hosted in a secure, redundant environment with SOC-certified data centers, managed updates, routine maintenance, and 24/7 monitoring.

B. County-Hosted Environment: Deployed on County-owned infrastructure that meets vendor-specified hardware, database, and security requirements.

In both cases, the vendor remains responsible for:

- System performance
- Security patching
- Product upgrades
- Compliance with NC data retention and public record laws

4.3 Required System Integrations



The solution must integrate with key Alamance County systems, including:

4.3.1 GIS System Integration

- Real-time or near-real-time parcel synchronization
- Map-based property information lookups
- Support for split/merge workflows and parcel layer changes

4.3.2 Financial/ERP System Integration

The system must connect to the County's ERP for:

- General ledger postings
- Daily deposit reconciliation
- Payment imports/exports
- Revenue classification

(An ERP-agnostic integration design is required.)

4.3.3 Payment Processor Integration

- Electronic payment posting
- Real-time payment validation
- Automated refund workflows (if supported by payment vendor)

4.3.4 State and External Integrations

- NC DOR (as applicable)
- DMV property tax records (if applicable)
- Escrow/banking interfaces

4.4 Statutory Compliance Requirements

The system must be fully compliant with:

- North Carolina Machinery Act
- County property tax listing and billing requirements
- Public records requirements under N.C.G.S. 132
- Retention and archival standards required for local government records
- Annual notice generation and publication requirements
- North Carolina Property Tax Commission (PTC) procedural compliance

Vendors must commit to ongoing updates to maintain compliance with legislative changes.

4.5 Security and Access Requirements

The system must include:

- Multi-factor authentication
- Encrypted data transfer and storage



- Detailed permission controls and configurable user roles
- Full audit trails of all data modifications
- Automated session timeout and login controls
- Protection against OWASP-listed vulnerabilities
- Disaster recovery and failover capabilities consistent with modern IT standards

4.6 Data Conversion Requirements (Overview)

The vendor must deliver full, validated migration of historical and current data from OneTax. This includes, but is not limited to:

- Parcel records and property attributes
- Ownership history
- Valuation history and cost tables
- Personal property listings
- Billing history, receipts, and adjustments
- Delinquent collections, payment plans, and garnishments
- Appeal records and documentation
- Archived records needed for statutory reference

A detailed description of required data migration services is provided in Section 7.

4.7 Implementation Services

The vendor must provide a complete implementation methodology including:

- Project governance and project management
- Business process analysis
- Configuration workshops
- Data mapping and conversion
- System integration development
- Testing and quality assurance
- User Acceptance Testing (UAT) coordination
- Go-live transition and post-go-live stabilization
- Training and administrative knowledge transfer

A full description is included in Section 8.

4.8 Training Requirements

The vendor must provide:

- Administrator training
- End-user training for each module
- Documentation, manuals, and online materials
- Train-the-trainer resources



- Refresher training during stabilization

Training must combine demonstration, hands-on practice, and County-specific configuration.

4.9 Support and Maintenance Requirements

Following implementation, the vendor must provide:

- Helpdesk access
- Product updates
- Legislative updates for NC statute changes
- Ongoing performance monitoring
- Annual system reviews
- Clearly defined SLAs for resolution times

These requirements are addressed in detail in Section 9.

4.10 Deliverables

The selected vendor must deliver, at minimum:

- Fully configured property tax software solution
- All required integrations
- Fully migrated data
- User manuals and administrator guides
- Test plans, scripts, and results
- Training materials
- Final acceptance documentation
- Ongoing support contract



5. FUNCTIONAL REQUIREMENTS

This section outlines the required functional capabilities of the proposed Property Tax Software System. The system must support all phases of tax administration—listing, appraisal, assessment, billing, collection, and public service—within an integrated platform that complies with North Carolina statutes and county operational needs.

The requirements listed below represent the minimum functional expectations. Vendors may propose additional functionality that enhances efficiency, accuracy, or public service.

5.1 Real Property Listing and Appraisal

The system must support comprehensive real property listing and valuation, including:

- Entry and maintenance of land and building characteristics
- Multiple structures and outbuildings per parcel
- Land valuation models including acreage, soil types, and market adjustments
- Building valuation models including cost, depreciation, and market adjustments
- Support for neighborhood or market-based modeling
- Effective-date control for all parcel and improvement changes
- Integration with GIS for parcel boundary, map-based lookup, and split/merge workflows
- Support for special classifications, exemptions, and exclusions
- Automated calculation of value changes based on new or modified attributes
- Multi-year valuation history retention with access to prior revaluation models
- Tools for valuation comparison, ratio studies, and analytical reporting

5.2 Personal Property Listing and Valuation

The system must support both business personal property (BPP) and individual personal property (IPP), including:

- Business account creation and maintenance
- Secure online listing portal for business and individual taxpayers
- Support for asset-based, depreciation-table, and cost-based valuation methods
- Importing of asset lists and depreciation schedules
- Support for discoveries, late listings, and penalties
- Integrated exemption processing (e.g., present-use equipment, religious/charitable uses)
- Automated reminders and correspondence generation
- Validation tools to identify incomplete or inconsistent listings
- Audit functions to track changes and maintain compliance documentation

5.3 Land Records and Ownership Administration

The system must support complete ownership and land records tracking:

- Deed and transfer processing workflows



- Automated creation of ownership chains with date controls
- Support for parcel splits, combinations, boundary line adjustments, and recombinations
- Integration with Register of Deeds data (import of deed records or extracts)
- Support for multiple owners with configurable fractional shares
- Maintenance of situs addresses, mailing addresses, and historical address data
- Audit-ready ownership history per parcel

5.4 Billing and Collections

The system must support all billing and collection activities for real and personal property, including:

- Annual billing generation with district rates and applicable fees
- Supplemental and omitted billing workflows
- Interest and penalty calculations compliant with NC law
- Payment posting in real time or batch mode
- Integration with online payment processors
- Support for payment plans, prepayments, and partial payments
- Automated delinquency notices, garnishment tracking, and foreclosure monitoring
- Refund processing with ERP integration
- Lockbox payment file processing (if applicable)
- Multiple tender types including online card payments, ACH, walk-in payments, and mailed checks

5.5 Appeals and Reviews

The system must support formal and informal appeal workflows:

- Informal review tracking with decision recording
- Board of Equalization and Review (BOER) case tracking
- Evidence attachments and documentation management
- Parcel-level appeal history
- Workflow notifications for deadlines and hearing schedules
- Exportable reports for BOER and PTC documentation

5.6 Public Access and Citizen Portal

The system must provide an online, secure portal for taxpayers and the public, including:

- Property search by owner, address, parcel ID, or map view
- Online bill presentment
- Online payment capability using major tender types
- Online business personal property listing (secured)
- Downloadable tax statements and receipts
- Ownership and valuation detail display with filtering and export options
- Support for mobile-friendly access



5.7 Reporting, Analytics, and Data Access

The system must provide robust reporting capabilities:

- Standard operational reports (bill books, collections, exemptions, delinquency, etc.)
- Support for ad-hoc/custom reporting
- Export capabilities to CSV, Excel, and PDF
- Graphical dashboards for real-time status monitoring
- Built-in regulatory and statutory reports for North Carolina compliance
- Logging and audit reports of user and system changes

5.8 Workflow and Task Management

The system must include configurable workflows to route tasks and approvals based on:

- Listing changes
- Exemption requests
- Transfer reviews
- Personal property audits
- Data corrections
- Appeals
- Billing adjustments
- User-configurable business rules

5.9 Document Management and Attachments

The system must support:

- Secure digital storage of documents and attachments
- Linking of deeds, maps, correspondence, images, and evidence to parcels
- Integration with County document storage solutions where applicable
- Indexed search for attached documents

5.10 Audit Trails and Compliance Controls

The system must provide:

- Full audit history of any data change
- User-level traceability
- Time-stamped system transactions
- Compliance with NC public records requirements
- Configurable retention and archival rules



6. TECHNICAL REQUIREMENTS

The proposed Property Tax Software System must be built on a secure, modern technology architecture capable of supporting high availability, strong cybersecurity protections, seamless integration, reliable performance, and scalable growth. Vendors must demonstrate that their technology platform meets or exceeds the following technical requirements, ensuring sustainability and flexibility for future statutory, operational, and technological changes.

6.1 System Architecture

The system must provide:

- A modern, enterprise-class architecture suitable for government operations
- Cloud-hosted (SaaS) or County-hosted deployment options
- A unified database structure supporting all modules
- Configurable business rules without vendor customization
- High-availability design minimizing downtime
- Secure access for internal and external users
- Scalable performance to accommodate future parcel growth

6.2 Hosting and Infrastructure Requirements

If offered as a SaaS solution, the vendor must provide:

- Hosting in SOC-compliant data centers
- Redundant infrastructure for disaster recovery
- Automated backups and retention policies aligned with NC records requirements
- Regular product updates and patching
- 24/7 system monitoring and event logging
- Documented uptime service level agreements

If offered as a County-hosted solution, the vendor must supply:

- Supported server and database specifications
- Storage, network, and firewall requirements
- Hardware sizing guidance
- Patch and update schedules

6.3 Security Requirements

Security features must include:

- Multi-factor authentication (MFA)
- Encryption of data in transit and at rest
- Role-based access controls
- Configurable permission sets for all user types
- Hardened authentication protocols



- Defense against OWASP-listed vulnerabilities
- Detailed audit logging of all actions
- IP filtering and session timeouts
- Compliance with NIST or equivalent frameworks

6.4 Integration and API Requirements

The system must integrate with Alamance County's technology ecosystem through:

- RESTful API endpoints or equivalent modern interface standards
- Secure authentication protocols for integrations
- Real-time or near-real-time updates between systems
- API documentation for County IT staff
- Support for event-based or scheduled data exchanges

Required integrations include:

- Geographic Information System (GIS)
- County ERP/financial system
- Payment processors
- State systems as applicable
- Document management systems

6.5 Database and Data Management Requirements

The system must provide:

- A relational or modern enterprise-grade database platform
- Comprehensive data validation controls
- Versioning and effective-dating of data
- Configurable data fields and lookups
- Data export capabilities for reporting and analysis
- Secure handling of PII and sensitive tax data

6.6 Performance Requirements

The system must:

- Support concurrent users during peak periods (e.g., billing, appeals)
- Deliver fast response times for parcel searches, valuation screens, and payment posting
- Handle large batch operations (annual billing, revaluation recalculation)
- Maintain consistent performance during systemwide updates

6.7 Business Continuity and Disaster Recovery

The vendor must provide:

- Documented disaster recovery plan



-
- Data replication processes (for SaaS)
 - Defined Recovery Time Objectives (RTO)
 - Defined Recovery Point Objectives (RPO)
 - Regular DR testing
 - Rapid restoration processes

6.8 Logging, Monitoring, and Audit Capabilities

The system must include:

- System health monitoring
- Performance and error logs
- User activity logs
- Security event logging
- Tools for County IT to review logs when necessary



7. DATA MIGRATION REQUIREMENTS

The selected vendor must provide complete, accurate, and validated migration of all relevant historical and current data from Alamance County's existing enterprise property tax system (OneTax) into the new system. Data migration is a mission-critical component of this implementation and must be conducted with meticulous planning, thorough testing, and fully documented procedures.

The County expects a turnkey migration solution that minimizes disruption, ensures data integrity, and provides continuity of operations throughout the transition.

7.1 General Requirements

The vendor must:

- Assume full responsibility for the planning, execution, validation, and delivery of all data conversion activities
- Provide a detailed data migration plan within the project initiation phase
- Identify all data sources, data types, and required mappings
- Ensure accuracy, record completeness, and systemwide consistency
- Perform multiple test conversions prior to final go-live
- Maintain strict data security and confidentiality throughout the process
- Collaborate closely with County subject matter experts and IT staff

7.2 Data Sources for Migration

At a minimum, the migration must include:

- Parcel master records
- Ownership history and related contact information
- Real property characteristics (land, buildings, improvements)
- Valuation history including cost tables, depreciation, and model components
- Personal property accounts and historical filings
- Asset listings and depreciation details
- Bill history and billing detail for all applicable tax years
- Payment history including receipts, adjustments, refunds, and tender information
- Delinquency records, garnishments, and payment plans
- Appeals documentation, results, and hearing outcomes
- Exemptions, exclusions, and special programs
- Parcel splits, combines, and mapping history
- Supporting documents and attachments, if technically feasible
- Notices and correspondence history, where stored in structured form

The vendor must identify any additional data elements required for statutory, financial, historical, or operational continuity.



7.3 Data Mapping and Transformation

The vendor must produce a comprehensive data mapping document that:

- Identifies each source field and its destination field
- Indicates transformation rules, calculations, or business logic applied
- Identifies required data cleansing or deduplication
- Documents assumptions regarding legacy data structures
- Highlights any data gaps and recommended remediation steps

The County must be able to review and approve the mapping prior to conversion.

7.4 Test Conversions

The vendor must perform multiple test migrations, including:

A. Initial Proof-of-Concept Conversion

A limited subset of data to validate extraction, mapping, and loading processes.

B. Full Test Conversion

A complete migration of all necessary data into a testing environment.

C. Parallel Conversion

Executed close to go-live to confirm:

- Record counts match
- Valuations are accurate
- Bills and interest calculations align
- Payments post correctly
- Ownership and history converted correctly

Each test conversion must include:

- Logging and documentation of errors or exceptions
- Vendor-provided reconciliation reports
- County review and approval checkpoints

7.5 Data Validation and Reconciliation

The vendor must provide tools, reports, and methodologies for:

- Verifying data completeness
- Identifying and resolving discrepancies
- Ensuring valuation history is preserved accurately
- Validating billing and payment histories
- Confirming ownership chains and parcel identifiers
- Ensuring compliance with NC statutory and accounting requirements



Reconciliation reports must include:

- Record counts by module
- Exception logs
- Failed record lists
- Field-level discrepancy reports

County approval is required before proceeding to final conversion.

7.6 Final Conversion and Go-Live

The final cutover must:

- Be scheduled during a mutually agreed-upon downtime window
- Ensure minimal disruption to County operations
- Include a full system backup prior to execution
- Use the validated and approved mapping
- Include final reconciliation reports before go-live approval
- Be carried out under the direct supervision of the vendor's data migration lead

All post-conversion issues discovered during stabilization must be corrected promptly at no additional cost.



8. IMPLEMENTATION SERVICES

The selected vendor must deliver a complete, structured, and collaborative implementation process that ensures a smooth and successful transition from the County's current OneTax system to the new property tax software platform. The implementation must follow an established project methodology and include comprehensive project management, configuration, testing, training, and deployment activities.

The County expects a turnkey implementation, with the vendor responsible for guiding the County through every phase of the project.

8.1 Project Management

The vendor must provide qualified project management personnel who will:

- Serve as the primary point of contact for the County
- Develop and maintain a detailed project plan and schedule
- Facilitate recurring status meetings
- Manage milestones, deliverables, and dependencies
- Coordinate vendor resources and County teams
- Mitigate risks and resolve issues
- Provide written progress reports throughout the project

A dedicated project manager with experience implementing property tax systems in local government environments is required.

8.2 Project Kickoff and Discovery

The project must begin with:

- A formal kickoff meeting
- Identification of County stakeholders and project roles
- Review of project scope, objectives, and timelines
- Discovery sessions to assess current processes and requirements
- Documentation of workflows, data structures, and integration needs

The vendor must prepare a Discovery Summary Report for County review and approval.

8.3 System Configuration

The vendor must configure the software to meet Alamance County's operational, statutory, and workflow requirements, including:

- Real property and personal property business rules
- Cost tables, depreciation schedules, schedules of values, and appraisal models
- Billing cycles and interest rule configuration
- District rates, tax codes, and special program settings
- Exemptions, exclusions, and present-use valuation parameters
- User roles, security permissions, and access controls



- Workflow automation and approval routing

All configuration steps must be fully documented.

8.4 Integration Development and Validation

The vendor must develop, configure, or enable integrations with:

- GIS
- County ERP/financial system
- Online payment processors
- Document management systems
- State systems as applicable

Integration development must include:

- Data mapping
- API configuration
- Security validation
- Testing and error-handling verification

The County must be able to assist in testing and confirm successful integration behavior.

8.5 Data Migration Coordination

The implementation team will work jointly with the data migration team (see Section 7) to:

- Validate data mapping
- Review test migration results
- Confirm reconciliation outcomes
- Identify and resolve data issues
- Approve final conversion readiness

This phase ensures that the new system launches with accurate, complete data.

8.6 Testing and Quality Assurance

The vendor must support a robust testing process that includes:

Unit Testing

Ensures vendor configuration and integration components function as expected.

System Testing

Validates the end-to-end functionality of the system.

User Acceptance Testing (UAT)

County staff perform real-world testing using configured workflows.

The vendor must supply:

- Testing scripts
- Expected results



- Issue-tracking tools
- Documentation of test outcomes

No system may proceed to go-live without formal UAT approval.

8.7 Training and Knowledge Transfer

Training must be tailored to the various roles within Alamance County Tax Administration, and must include:

- End-user training for real property, personal property, billing, collections, land records, and appeals
- Administrator and technical training, including reporting and security configuration
- Train-the-trainer sessions for sustained knowledge
- Training materials, guides, and reference sheets
- Recordings of virtual sessions where possible

Training must be delivered prior to final data conversion and go-live.

8.8 Go-Live Preparation and Cutover

Prior to go-live, the vendor must:

- Prepare a detailed cutover plan
- Execute final data conversion
- Validate system readiness
- Ensure integrations are functioning
- Confirm County staff are fully trained
- Provide on-site or remote support during go-live

The vendor must remain available throughout the stabilization period to resolve issues rapidly.

8.9 Post-Go-Live Stabilization

Following deployment, the vendor must provide:

- Enhanced support during the stabilization window
- Monitoring of key processes (billing, payments, corrections)
- Rapid response to functional or data issues
- Adjustments and refinements as needed
- A stabilization closeout report for County approval



9. SUPPORT & MAINTENANCE REQUIREMENTS

Following successful implementation and transition to production, the vendor must provide comprehensive support and maintenance services to ensure the system remains secure, reliable, compliant with North Carolina law, and capable of supporting the County's long-term operational needs. The vendor must demonstrate a proven support model with clear service level expectations, documented escalation procedures, and a commitment to ongoing system enhancement.

9.1 General Support Expectations

The vendor must provide continuous support services that include:

- Assistance with day-to-day questions and troubleshooting
- Resolution of software defects, errors, or performance issues
- Guidance related to configuration changes or workflow adjustments
- Responses to system access, user permissions, or security requests
- Coordination on integration issues with County systems or third-party partners

Support must be available to authorized County personnel through multiple channels such as phone, email, web portal, or ticketing system.

9.2 Helpdesk and Service Levels

The vendor must maintain a helpdesk that observes clearly defined Service Level Agreements (SLAs) including:

- Guaranteed response times based on severity level
- Qualified support personnel who understand property tax workflows
- Status updates throughout the ticket lifecycle
- Documented and traceable ticket tracking
- Escalation paths for unresolved issues

SLAs must be proposed in the vendor's response, including:

- Critical issue response time
- Non-critical issue response time
- Target resolution times
- Expected uptime levels for SaaS environments

9.3 Software Maintenance and Enhancements

The vendor must provide ongoing software maintenance that includes:

- Routine patches and updates
- Security enhancements
- Performance improvements
- Fixes for bugs or defects
- Enhancements related to usability, reporting, or workflow optimization
- Regular system version upgrades



Updates must be accompanied by:

- Release notes
- Documentation of new features
- Instructions for configuration changes, if required
- Advance notice of any feature deprecation

9.4 Legislative and Regulatory Updates

Given the critical role of property taxation in North Carolina, the vendor must:

- Monitor legislative changes impacting North Carolina property tax law
- Deploy updates necessary to maintain statutory compliance
- Provide timely patches or configuration adjustments to support new legal requirements
- Offer documentation explaining the impact of each statutory update on County workflows

The County must not incur additional charges for routine statutory updates required for compliance.

9.5 System Monitoring and Performance Management

If the system is hosted in a cloud environment (SaaS), the vendor must provide:

- 24/7 system monitoring
- Automated alerts for system anomalies
- Performance optimization and resource scaling
- Continuous security event logging
- Proactive detection of unauthorized access or abnormal system activity

County-hosted deployments must include vendor guidance for:

- Server resource utilization thresholds
- Database maintenance best practices
- Log management and archival procedures

9.6 Disaster Recovery and Business Continuity

The vendor must maintain a documented plan that provides:

- Redundant infrastructure for high availability
- Defined RTO (Recovery Time Objective) and RPO (Recovery Point Objective)
- Regular backup and restoration procedures
- Annual disaster recovery testing
- Continuity of operations during outages or infrastructure failures

The County must be informed of any incident affecting data availability or security.

9.7 User Account Management and Security Support

The vendor must assist with:

- Role-based user provisioning



- Multi-factor authentication support
- Password management protocols
- Review and guidance on security permissions
- Periodic user access audits

Security updates must be delivered promptly with minimal system disruption.

9.8 Ongoing Training and Knowledge Transfer

The vendor must provide continuing education for County staff through:

- Updated training materials after major releases
- Online learning modules or knowledge bases
- Optional refresher or supplemental training
- Opportunities for participation in user groups or vendor conferences

9.9 Annual Review and Optimization

The vendor must offer annual account reviews that include:

- System usage analysis
- Recommendations for workflow or configuration improvements
- Review of integrations and performance
- Discussion of upcoming product enhancements
- Identification of emerging statutory or operational needs



10. PROPOSAL INSTRUCTIONS

Vendors must follow the instructions in this section when preparing and submitting proposals. Proposals that do not conform to these requirements may be deemed non-responsive.

10.1 General Instructions

- Proposals must be complete, organized, and clearly written.
- All content must be accurate and reflect the vendor's actual product and service capabilities.
- Any proposal that includes misleading, inaccurate, or unverifiable statements may be rejected.
- Vendors are responsible for reviewing all RFP documents and addenda before submitting a proposal.

10.2 Proposal Submission

Alamance County requires four (4) paper copies and one (1) PDF copy on a USB drive.

Proposals must be submitted in a sealed envelope, clearly labeled, with:

- Vendor Name
- RFP #27-P002
- Attn: Charles Bullard, Purchasing Manager

10.3 Deadline for Submission

All proposals must be submitted no later than:

Date and Time: **09/01/2026 at 3:00PM**

Late proposals will be automatically rejected.

10.4 Proposal Questions and Clarifications

Vendors may submit written questions regarding this RFP through email to **Brad Fowler** (brad.fowler@alamancecountync.gov).

- Questions submitted outside of email will not be accepted.
- The County will provide written responses through email.
- Answers may be shared with all registered vendors as addenda.
- Questions are due by: **August 14, 2026, at 5:00PM**
- Answers to questions will be sent out via email and posted to the County's website by:
August 21, 2026, at 4:00PM

The County may issue addenda at any time before the submission deadline.

10.5 Required Proposal Format

Proposals must include the following sections, in the order listed below:

Cover Letter

Vendor Background and Qualifications



Project Team

Technical and Functional Solution Description

Implementation Methodology

Data Migration Approach

Hosting and Security Overview

Support & Maintenance Plan

Project Schedule and Milestones

Cost Proposal (Appendix A)

Completed Technical Requirements Matrix

Completed Forms (Appendices B–E)

Each section must be clearly labeled.

10.6 Page Formatting Requirements

- PDF format only
- Letter size (8.5" x 11") pages
- Minimum 11-point font
- Page numbers required
- Charts and graphics are permitted
- No marketing pamphlets or unrelated promotional materials

10.7 Multiple or Alternate Proposals

Vendors may submit one primary proposal. Alternate proposals may be submitted only if:

- They clearly differ from the primary proposal
- They are submitted as separate files
- They follow the same proposal structure

10.8 Confidential and Proprietary Information

Proposals become public records upon submission unless otherwise protected by NC law.

If a vendor includes proprietary content:

- Each affected page must be clearly marked "Confidential"
- A summary list of confidential sections must be provided
- Vendors must comply with N.C.G.S. 132 and other relevant statutes

The County will attempt to protect legitimate trade secrets but cannot guarantee confidentiality.

10.9 Withdrawal or Modification of Proposal

Vendors may:



- Withdraw proposals prior to the submission deadline through the portal
- Submit updated versions before the deadline

After the deadline, proposals may not be withdrawn or modified.

10.10 Costs of Proposal Preparation

Vendors are responsible for all costs associated with preparing and submitting proposals. The County is not obligated to reimburse expenses.

10.11 Rights Reserved by Alamance County

Alamance County reserves the right to:

- Reject any or all proposals
- Waive minor informalities
- Request additional information from vendors
- Accept the proposal deemed most advantageous
- Cancel or reissue this RFP
- Conduct vendor demonstrations
- Negotiate with one or more vendors

Submission of a proposal does not guarantee a contract award.



11. EVALUATION CRITERIA

Alamance County will evaluate all proposals submitted in response to this RFP using a structured, weighted review process. The goal of the evaluation process is to select the vendor whose solution, experience, services, and costs provide the greatest overall value to the County and best support long-term operational needs.

The County reserves the right to request clarifications, conduct interviews or demonstrations, and engage in negotiations with one or more vendors prior to contract award.

11.1 Evaluation Overview

Proposals will be evaluated based on the following major criteria categories:

Vendor Background and Qualifications

Project Team and Implementation Approach

Functional and Technical Fit

Support, Maintenance, and Sustainability

Cost Proposal

Quality and Completeness of Proposal Submission

Each category includes multiple sub-criteria as described below.

11.2 Evaluation Categories and Weighting

- 1. Vendor Background and Qualifications
 - Experience with property tax systems
 - Experience working with North Carolina counties or similar jurisdictions
 - Financial stability and long-term viability
 - References and past performance
- 2. Project Team and Implementation Approach
 - Qualifications of key personnel
 - Implementation methodology and timeline
 - Training and knowledge-transfer strategy
 - Project management tools and communication plan
- 3. Functional and Technical Fit
 - Ability to meet or exceed functional requirements
 - Ability to meet or exceed technical requirements
 - Integration capabilities
 - Security and hosting strength
 - Quality of the data migration approach
 - Completeness of the Technical Requirements Matrix
- 4. Support, Maintenance, and Sustainability
 - Service level commitments



- Support structure and escalation procedures
- Legislative update process
- Product roadmap and enhancement cycles
- Ongoing training options
- 5. Cost Proposal
- Total cost of ownership over the contract term
- Clarity and transparency of pricing
- Licensing model (SaaS vs. on-premise)
- Cost predictability
- Optional component pricing
- 6. Proposal Quality and Completeness
- Organization and readability
- Compliance with RFP format
- Accuracy and thoroughness
- Professionalism of the submission

11.3 Demonstrations and Interviews

Based on initial scoring, the County may:

- Invite vendors for a software demonstration
- Conduct interviews with key project team members
- Request configuration examples or workflow scenarios
- Require vendors to demonstrate specific functional areas such as:
- CAMA modeling
- Personal property listing portal
- Billing and collection workflows
- GIS integration
- Reporting and analytics
- Data migration validation tools

Participation in demonstrations may influence final evaluation scores.

11.4 Best Value Determination

The County will determine the vendor offering the “best value” based on:

- Technical merit
- Functional match
- Implementation readiness
- Long-term sustainability
- Total cost of ownership
- Vendor partnership potential



The County is not obligated to select the lowest-cost proposal.

11.5 Final Selection and Award

Once evaluations are complete, the County may:

- Select a vendor for contract negotiation
- Request revised proposals (if necessary)
- Conduct final due-diligence checks
- Issue a notice of award

Award of a contract is subject to:

- Successful contract negotiation
- Approval by the appropriate Alamance County governing authority
- Availability of funds



12. TERMS & CONDITIONS

The following terms and conditions will govern the procurement, contract award, and ongoing relationship between Alamance County and the selected vendor. By submitting a proposal, vendors agree to abide by these terms unless otherwise negotiated and approved by the County.

12.1 Contract Term

The County anticipates awarding a contract with the following structure:

- Initial Term: Four (4) years
- Renewal Options: Up to two (2) additional two-year renewal periods, at the County's sole discretion

Renewals will be based on factors including system performance, vendor responsiveness, County needs, and budget availability.

12.2 Contract Formation

A contract is formed only when:

- Alamance County formally awards the project, and
- Both parties execute a written agreement approved by the appropriate County authority.

Proposal submission alone does not constitute a binding agreement.

12.3 Pricing and Invoicing

Vendor pricing must remain firm for the duration of the initial contract term. Invoices must:

- Clearly identify delivered services and associated costs
- Be itemized according to the cost categories in Appendix A
- Be submitted to the County in accordance with the executed contract
- Reflect only services/products that have been accepted

Payment will be made in accordance with County financial policies.

12.4 Insurance Requirements

The successful vendor must maintain insurance coverage including, but not limited to:

- Commercial general liability
- Professional liability / errors & omissions
- Cybersecurity and privacy liability
- Worker's compensation (as applicable)
- Automobile liability (as applicable)

Insurance limits and details will be finalized during contract negotiation in accordance with County policy.

12.5 Public Records Compliance

All documents submitted to Alamance County may be subject to North Carolina Public Records Law (N.C.G.S. 132). Vendors identifying portions as trade secrets must:



- Clearly mark each page containing proprietary information
- Provide a justification for the designation
- Submit a redacted public version if required

The County will attempt to protect trade secrets but cannot guarantee confidentiality.

12.6 Indemnification

The vendor must indemnify and hold harmless Alamance County, its officers, employees, and agents from claims, damages, or liabilities arising from the vendor's:

- Negligence
- Misconduct
- Breach of contract
- Data breaches caused by vendor systems or vendor negligence

Specific indemnification language will be included in the final contract.

12.7 Intellectual Property

Vendors must warrant that:

- All software, documentation, and materials provided do not infringe on any third-party rights
- The County will retain rights to its own data and any County-funded custom configurations
- Any County-created content remains County property

No licenses may restrict the County's access to its own data.

12.8 Subcontracting

Use of subcontractors requires prior written County approval. Vendors remain fully responsible for all actions, omissions, and performance of subcontractors.

12.9 Termination

The County reserves the right to terminate the contract:

- For cause (e.g., breach, non-performance, security concerns)
- For convenience with prior written notice (typically 30 days)

Upon termination, the vendor must:

- Cooperate with transition activities
- Return all County data in a usable format
- Cease use of County resources

12.10 Confidentiality and Data Protections

Vendors must:

- Protect all County data
- Encrypt all sensitive or personally identifiable information



- Limit access to authorized personnel
- Adhere to NC data breach notification laws
- Support secure data export and retention according to County and state requirements

12.11 Governing Law and Jurisdiction

This procurement and resulting contract shall be governed by the laws of the State of North Carolina. Venue for disputes shall be in the appropriate court within Alamance County.

12.12 Non-Discrimination

Vendors must comply with all applicable federal and state non-discrimination laws, including equal employment opportunity requirements.

12.13 E-Verify Compliance

Vendors must comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes related to E-Verify for all employees and subcontractors.

12.14 Conflicts of Interest

Vendors must disclose any real or potential conflicts of interest. Failure to do so may result in disqualification.

12.15 Divestment from Companies that Boycott Israel

Pursuant to Article 6G of Chapter 147 of the North Carolina General Statutes (N.C.G.S. § 147-86.80 et seq.), a company identified on the North Carolina State Treasurer's list of restricted companies engaged in a boycott of Israel is ineligible to contract with Alamance County, and a contract entered into in violation of this prohibition is void by operation of law. No vendor certification is required by statute; the County will independently confirm that the apparent successful vendor does not appear on the Treasurer's restricted company list prior to award.

12.16 Small Business Participation

The North Carolina Historically Underutilized Business (HUB) statutes and the State Office for Historically Underutilized Businesses were eliminated effective July 7, 2026, under Section 22.5 of the 2026 Appropriations Act (S.L. 2026-41). This RFP accordingly contains no HUB-based participation goal, preference, or certification requirement. The State's race- and gender-neutral Small Business Enterprise (SBE) Program, which is transitioning to the NC Department of Administration's Division of Purchase and Contract, remains available to vendors on a voluntary basis. Vendors may, at their option, describe any use of North Carolina small businesses as subcontractors or partners in the performance of this contract; such information will not be scored or weighted in the evaluation process described in Section 11.



13. TECHNICAL REQUIREMENTS MATRIX (TEXT VERSION)

This matrix is written entirely from scratch. It is designed so you can later convert it into Excel.

The matrix includes categories such as:

- CAMA
- Personal Property
- Billing & Collections
- Land Records
- GIS Integration
- ERP Integration
- Payment Processing
- APIs & Integrations
- Hosting & Security
- Reporting
- Workflow
- Document Management
- Audit & Compliance
- Additional Capabilities

Each requirement includes a placeholder for vendors to select a response code (Y, E, MN, MC, etc.) and add comments.

TECHNICAL REQUIREMENTS MATRIX (TEXT / TABLE FORMAT)

(You may copy/paste this into Excel exactly as is.)

CATEGORY 1: Computer Assisted Mass Appraisal (CAMA)

Requirement	Response Code (Y / E / MN / MC)	Vendor Comments

CATEGORY 2: Personal Property

Requirement	Response Code (Y / E / MN / MC)	Vendor Comments



Requirement	Response Code (Y / E / MN / MC)	Vendor Comments

CATEGORY 3: Billing & Collections

Requirement	Response Code (Y / E / MN / MC)	Vendor Comments

CATEGORY 4: Land Records & Ownership

Requirement	Response Code (Y / E / MN / MC)	Vendor Comments

CATEGORY 5: GIS Integration

Requirement	Response Code (Y / E / MN / MC)	Vendor Comments

CATEGORY 6: ERP Integration

Requirement	Response Code (Y / E / MN / MC)	Vendor Comments



Requirement	Response Code (Y / E / MN / MC)	Vendor Comments

CATEGORY 7: Payment Processor Integration

Requirement	Response Code (Y / E / MN / MC)	Vendor Comments

CATEGORY 8: APIs & System Interoperability

Requirement	Response Code (Y / E / MN / MC)	Vendor Comments

CATEGORY 9: Hosting & Security

Requirement	Response Code (Y / E / MN / MC)	Vendor Comments