



Request for Proposals No. 2026-058
Union County Comprehensive Property Tax Software
Solution

Due Date: May 5, 2026
Time: 11:00 AM EDT
Receipt Location: Procurement & Contract Management Department
(Note: Follow the submittal instructions listed in this document to electronically upload a proposal package)

Procurement Representative

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Contents

1	Notice of Advertisement.....	3
2	Submittal Details	4
2.1	PROPOSAL SUBMISSION DEADLINE AND DELIVERY ADDRESS.....	4
2.2	PROPOSAL SUBMISSION REQUIREMENTS.....	4
2.3	NON-MANDATORY PRE-PROPOSAL CONFERENCE & SITE VISIT	ERROR! BOOKMARK NOT DEFINED.
2.4	PROPOSAL QUESTIONS	4
2.5	PROPOSAL ADDENDUM	4
2.6	COMMUNICATION.....	5
3	Introduction	5
3.1	COUNTY	5
3.2	PURPOSE	5
3.3	PROJECT BACKGROUND	6
4	Objectives of the Request for Proposals (RFP).....	7
4.1	OPERATIONAL EXCELLENCE	7
4.2	DATA INTEGRITY AND TRANSPARENCY	7
4.3	IMPROVED CITIZEN SERVICE	7
4.4	SYSTEM INTEGRATION AND INTEROPERABILITY	7
4.5	SCALABILITY AND FUTURE READINESS.....	8
4.6	VENDOR STABILITY AND LONG-TERM PARTNERSHIP.....	8
5	Scope of Services and System Requirements.....	8
5.1	OVERVIEW	8
5.2	VENDOR’S PROPOSED SOLUTION.....	8
5.3	APPLICATION SOFTWARE REQUIREMENTS	9
5.4	COMPUTER ASSISTED MASS APPRAISAL (CAMA) REQUIREMENTS	9
5.5	PERSONAL PROPERTY REQUIREMENTS.....	10
5.6	BILLING AND COLLECTIONS REQUIREMENTS	10
5.7	LAND RECORDS REQUIREMENTS.....	10
5.8	INFORMATION TECHNOLOGY REQUIREMENTS.....	10
5.9	DATA MIGRATION AND CONVERSION SERVICES	11
5.10	IMPLEMENTATION SERVICES	11
5.11	TRAINING AND KNOWLEDGE TRANSFER	11
5.12	MAINTENANCE AND SUPPORT	12
6	Technical Requirements	12
6.1	CAMA.....	ERROR! BOOKMARK NOT DEFINED.
6.1.1	<i>Sketching</i>	<i>Error! Bookmark not defined.</i>
6.2	PERSONAL PROPERTY.....	ERROR! BOOKMARK NOT DEFINED.
6.2.1	<i>Asset Maintenance.....</i>	<i>Error! Bookmark not defined.</i>
6.2.2	<i>Account Controls & Queries</i>	<i>Error! Bookmark not defined.</i>
6.2.3	<i>Rollover, Forms & Reporting.....</i>	<i>Error! Bookmark not defined.</i>
6.3	BILLING & COLLECTION – CORE PROCESSING.....	ERROR! BOOKMARK NOT DEFINED.
6.3.1	<i>Billing & Collections – Account Data & Billing Processing</i>	<i>Error! Bookmark not defined.</i>
6.3.2	<i>Tax Bill Content.....</i>	<i>Error! Bookmark not defined.</i>
6.3.3	<i>Billing & Collections – Collections Processing.....</i>	<i>Error! Bookmark not defined.</i>
6.3.4	<i>Inquiry, Scrolls & Operational Reporting</i>	<i>Error! Bookmark not defined.</i>
6.3.5	<i>Technical Environment For All Modules.....</i>	<i>Error! Bookmark not defined.</i>
6.3.6	<i>Support & Training</i>	<i>Error! Bookmark not defined.</i>
6.3.7	<i>Reporting & Report Writing.....</i>	<i>Error! Bookmark not defined.</i>
6.3.8	<i>Maintenance & Updates.....</i>	<i>Error! Bookmark not defined.</i>
6.3.9	<i>Data Conversion.....</i>	<i>Error! Bookmark not defined.</i>

6.3.10	Interface & Integration.....	Error! Bookmark not defined.
6.3.11	Security & Auditing.....	Error! Bookmark not defined.
7	Detailed Submittal Requirements and Instructions	14
7.1	TERMS OF SUBMISSION.....	14
7.2	PROPOSAL FORMAT.....	15
7.2.1	Section A – Cover Letter.....	16
7.2.2	Section B – Company Background and Relevant Experience	17
7.2.3	Section C – Project Team.....	17
7.2.4	Section D – Project Management, Technical Approach, and Quality Control.....	18
7.2.5	Section E – References.....	19
7.2.6	Section F – Cost Proposal.....	19
7.2.7	Section G – Required Forms.....	19
7.3	SELECTION PARTICIPANTS.....	19
7.4	EVALUATION SELECTION PROCESS	20
7.5	AWARD PROCEDURE	21
7.6	CONFLICT CERTIFICATION.....	21
8	General Conditions and Requirements	21
8.1	TERMS AND CONDITIONS.....	21
8.2	CONTRACTUAL OBLIGATIONS	22
8.3	SUB-CONTRACTOR/PARTNER DISCLOSURE	22
8.4	EXCEPTION TO THE PROPOSAL.....	22
8.5	MODIFICATION OR WITHDRAWAL OF PROPOSAL.....	22
8.6	EQUAL EMPLOYMENT OPPORTUNITY	23
8.7	MINORITY BUSINESSES (MBE) OR DISADVANTAGED BUSINESSES (DBE)	23
8.8	LICENSES.....	23
8.9	E-VERIFY	23
8.10	DRUG-FREE WORKPLACE	23
8.11	INSURANCE	24
8.12	INDEMNIFICATION	26
9	Appendix A – Cost Proposal.....	27
9.1	BASELINE SOFTWARE COSTS.....	27
9.2	IMPLEMENTATION & PROFESSIONAL SERVICES	27
9.3	ONGOING MAINTENANCE & HOSTING	28
9.4	OPTIONAL COSTS (IF APPLICABLE)	28
9.5	COST SUMMARY.....	28
9.6	PRICING DISCLOSURES	29
10	Appendix B – Union County Equipment List	Error! Bookmark not defined.
11	Appendix C – Proposal Submission.....	30
12	Appendix D – Addendum and Anti-Collusion	31
13	appendix E – vendor payment notification.....	32
14	appendix F – template contract.....	33

1 NOTICE OF ADVERTISEMENT

**Union County, North Carolina
Request for Proposals No. 2026-058
Union County Comprehensive Property Tax Software Solution**

Electronic proposals will be received by the Union County's Procurement & Contract Management Department by **11:00 AM EDT on May 5, 2026**. Late submittals will not be accepted.

Union County is seeking proposals from qualified and experienced software vendors to provide a comprehensive Government Property Tax Management Software Solution, including the implementation, configuration, data migration, integration, training, maintenance, and ongoing support of an integrated tax administration system. Copies of the solicitation may be obtained from the locations listed below:

1. Download the Proposal Documents from the Union County website: [Union County Procurement Bids](#)
2. Download the Solicitation Documents from the State of North Carolina Electronic Vendor Portal: [North Carolina eVP](#) (Bid by Departments, search County of Union).

All questions about the meaning or intent of the RFP Documents are to be submitted in writing to the Procurement Representative listed on the cover page (corey.brooks@unioncountync.gov) no later than **April 9, 2026 at 5:00 PM EDT**.

Union County reserves the right to reject any or all proposals, to waive technicalities and to make such selection deemed in its best interest.

Union County reserves the right to award a contract to multiple vendors.

Offerors are required to comply with the non-collusion requirements set forth in the Solicitation Documents.

Union County encourages good faith effort outreach to Minority Businesses (HUB Certified) and Small Businesses.

End of Notice of Advertisement

2 SUBMITTAL DETAILS

2.1 PROPOSAL SUBMISSION DEADLINE AND DELIVERY ADDRESS

All Proposal Submittals are to be received by the Union County Procurement & Contract Management Department no later than **11:00 AM EDT on May 5, 2026**, per the instructions below. Any submittals received after this date and time shall be rejected without exception.

2.2 PROPOSAL SUBMISSION REQUIREMENTS

The proposal must be submitted electronically using the following link: [Union County Proposal Submissions Portal](#). Select the Solicitation drop down arrow and choose this RFP from the list. Complete the form, upload your proposal, and select submit. An email will be sent to the address listed on the form as your confirmation of receipt. Please add this email address to your contact list.

The proposal package **must be signed** by a person who is authorized to bind the proposing Company. Instructions for preparing the proposal are provided herein.

Paper submissions will not be accepted.

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

- Reject any or all proposals, to waive technicalities and to make such selection deemed in its best interest.
 - Cancel this solicitation; and
- Award to multiple vendors.

2.3 PROPOSAL QUESTIONS

Proposal questions will be due on or before **April 9, 2026, at 5:00 PM EDT**. The primary purpose is to provide participating Offerors with the opportunity to ask questions, in writing, related to the RFP.

Submit questions by email to Corey Brooks at Corey.Brooks@unioncountync.gov by the deadline shown above. **The email subject line should identify the proposal number and project title.** All questions and answers may be posted as addenda on www.unioncountync.gov and/or <https://evp.nc.gov>

2.4 PROPOSAL ADDENDUM

Union County may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum.

Should an Offeror find discrepancies or omissions in this RFP, or any other documents provided by Union County, the Offeror should immediately notify the County of such potential discrepancy in writing via email as noted above.

Any addenda to these documents shall be issued in writing. No oral statements, explanations, or commitments by anyone shall be of effect unless incorporated in the written addenda. Receipt of Addenda shall be acknowledged by the Offeror on Appendix C – Addendum and Anti-Collusion form.

2.5 COMMUNICATION

All communications, any modifications, clarifications, amendments, questions, responses, or any other matters related to this Request for Proposals must be made only through the Procurement Contact noted on the cover of this RFP. A violation of this provision is cause for the County to reject a Company’s proposal. No contact regarding this document with other County employees is permitted and may be grounds for disqualification.

3 INTRODUCTION

3.1 COUNTY

The County (estimated population 263,386) is located in the central, southern piedmont. The County provides its residents with a full array of services that include public safety, water/wastewater utilities and sanitation, human services, cultural and recreational activities, and general government administration.

3.2 PURPOSE

Union County is seeking proposals from qualified firms to provide and implement a modern, enterprise-level Government Property Tax Management Software Solution. The intent of this Request for Proposals (RFP) is to procure a scalable, fully integrated tax administration platform to support Computer Assisted Mass Appraisal (CAMA), real and personal property administration, tax billing and collections, land records integration, field appraisal management, reporting, and citizen-facing services across the County.

This RFP falls under N.C. General Statute §143-129.8 as a procurement of information technology goods and services. The County anticipates selecting a qualified vendor to supply the core platform technology, perform system configuration and integration, conduct data migration from the County’s existing tax system, and provide long-term support, maintenance, training, and future system enhancement capabilities.

The selected solution should:

- Enable centralized and efficient management of all property tax administration functions,
- Provide seamless integration with the County’s existing GIS, ERP, financial, and payment processing systems through open architecture and API capabilities,
- Support secure, cloud-based (SaaS) or County-approved hosting environments with modern cybersecurity safeguards,
- Facilitate scalability to accommodate future growth, revaluation cycles, legislative changes, and expanded citizen service needs,
- Align with industry best practices for secure, compliant, and modern IT-based tax administration platforms.

Union County is not prescribing a specific product or brand and encourages all vendors to propose solutions that meet or exceed the technical, operational, statutory, and strategic needs outlined in this RFP.

3.3 PROJECT BACKGROUND

Union County Government provides a full range of public services to an estimated population of 263,386 residents and continues to experience steady growth across residential, commercial, and agricultural sectors. Union County Tax Administration is responsible for listing, appraising, assessing, billing, and collecting property taxes for real and personal property throughout the County.

The Tax Administration Office manages approximately:

- 117,000+ real property parcels (subject to growth since the prior system procurement),
- 20,000+ business and individual personal property accounts,
- Ongoing revaluation cycles in accordance with North Carolina statutory requirements,
- Annual tax billing and collection processes, appeals management, and public information services.

The County's current property tax software solution was procured under RFP 2016-034 and has supported operations for nearly a decade. While the existing system has met core operational needs, advancements in technology, cybersecurity requirements, integration capabilities, cloud hosting models, reporting tools, and citizen-facing service expectations have significantly evolved since that time.

The current system environment requires improved:

- Integration with GIS and enterprise financial systems,
- Open architecture and API capabilities,
- Advanced reporting and analytics functionality,
- Cybersecurity controls and audit tracking,
- Scalability to support continued population growth and development,
- Modern user interface and workflow automation,
- Citizen online access and self-service capabilities.

To support this modernization initiative, Union County seeks a partner with:

- Demonstrated expertise in enterprise-level government tax management platforms;
- Proven experience implementing integrated CAMA, billing/collections, and land records systems for North Carolina or similar jurisdictions;
- Strong knowledge of North Carolina General Statutes governing property tax administration;
- Experience conducting secure data migration and system conversion from legacy platforms;
- The ability to provide ongoing maintenance, support, training, and long-term strategic system planning.

The ultimate goal is to modernize Union County’s property tax administration ecosystem through a flexible, scalable, and open-architecture platform that enables centralized management, enhanced data integrity, improved operational efficiency, and seamless integration with existing and future County systems.

4 OBJECTIVES OF THE REQUEST FOR PROPOSALS (RFP)

The overall objective of this RFP process is to identify and contract with a qualified software provider that can deliver a modern, fully integrated, enterprise-level Government Property Tax Management Software Solution that supports the operational, statutory, technological, and strategic needs of Union County.

Through this procurement, Union County seeks to achieve the following objectives:

4.1 OPERATIONAL EXCELLENCE

- Streamline and modernize tax administration workflows across CAMA, billing and collections, land records, and field operations.
- Improve efficiency through automation, configurable business rules, and workflow management tools.
- Reduce manual processes and redundant data entry across departments.

4.2 DATA INTEGRITY AND TRANSPARENCY

- Improve accuracy, reliability, and consistency of property and tax data.
- Provide robust audit trails and change tracking in compliance with North Carolina public records requirements.
- Enhance reporting, analytics, and data accessibility for internal staff and external stakeholders.

4.3 IMPROVED CITIZEN SERVICE

- Enhance customer experience through intuitive public portals, online payments, property search tools, and digital access to records.
- Provide transparent access to tax data while maintaining strong data privacy and cybersecurity protections.

4.4 SYSTEM INTEGRATION AND INTEROPERABILITY

- Deliver open architecture and API-driven integration capabilities.
- Ensure seamless interoperability with the County’s existing GIS, ERP/financial systems, payment processors, and other enterprise applications.
- Eliminate data silos and improve cross-departmental coordination.

4.5 SCALABILITY AND FUTURE READINESS

- Provide a flexible and scalable solution capable of supporting continued population growth and development activity.
- Accommodate future statutory changes, revaluation cycles, and evolving business processes.
- Support cloud-hosted (SaaS) or County-approved hosting environments with modern cybersecurity safeguards.

4.6 VENDOR STABILITY AND LONG-TERM PARTNERSHIP

- Identify a vendor with demonstrated financial stability and a proven track record of successful implementations in comparable North Carolina or similarly sized jurisdictions.
- Ensure long-term support, regular product enhancements, and continued compliance with industry best practices and regulatory requirements.

Union County is not seeking to heavily customize software but rather to implement a proven solution that meets its requirements through standard functionality and configurable features. The selected vendor must present a clear implementation methodology, realistic project timeline, structured data migration approach, and comprehensive training and support plan.

5 SCOPE OF SERVICES AND SYSTEM REQUIREMENTS

5.1 OVERVIEW

Union County is seeking a comprehensive, fully integrated Government Property Tax Management Software Solution that supports the complete lifecycle of property tax administration in accordance with North Carolina General Statutes.

The selected vendor shall provide all software, implementation services, configuration, integration, data migration, training, documentation, maintenance, and long-term support necessary to successfully deploy and sustain the system.

The proposed solution must be a proven, enterprise-level platform capable of supporting Computer Assisted Mass Appraisal (CAMA), real and personal property administration, tax billing and collections, land records integration, reporting and analytics, and citizen-facing services.

The County intends to enter into a long-term partnership with a vendor capable of providing continuous product enhancements, regulatory compliance updates, cybersecurity safeguards, and scalable growth support.

5.2 VENDOR'S PROPOSED SOLUTION

The Vendor shall propose a comprehensive, fully integrated Government Property Tax Management Software Solution capable of supporting all statutory and operational requirements of Union County Tax Administration.

The Vendor's response shall clearly describe how its solution satisfies each functional and technical requirement outlined in this section. Vendors must indicate whether each requirement is:

- Standard functionality
- Configurable without customization
- Requires customization
- Not available

Vendors shall provide detailed explanations where necessary.

5.3 APPLICATION SOFTWARE REQUIREMENTS

The proposed system must be a fully integrated solution supporting:

- Computer Assisted Mass Appraisal (CAMA)
- Personal Property Administration
- Tax Billing and Collections
- Delinquent Collections Case Management
- Land Records Integration
- Field Appraisal Management
- Reporting and Analytics
- Citizen Web Portal

The system shall operate as a unified platform with a shared database and user security model.

5.4 COMPUTER ASSISTED MASS APPRAISAL (CAMA) REQUIREMENTS

The system shall:

- Maintain multi-year parcel history (minimum 10+ years plus current year)
- Maintain active and inactive parcel status without deletion
- Support revaluation modeling and mass appraisal tools
- Provide cost tables and valuation schedules
- Support depreciation modeling
- Track appeals and Board of Equalization cases
- Integrate with GIS for parcel mapping
- Allow configurable land and building attributes
- Provide robust query builder and reporting tools
- Maintain audit trails of all parcel changes
- Track user activity and field-level edits.
- Support real-time and batch processing
- Support effective dating of transactions
- Provide API access for valuation data
- Support mobile field data collection tools
- Multi-factor authentication

5.5 PERSONAL PROPERTY REQUIREMENTS

The system shall:

- Support business personal property listing and assessment
- Support individual personal property records
- Maintain depreciation schedules
- Allow electronic filing submission capability
- Track exemptions and special classifications
- Generate required NC statutory forms
- Provide audit tracking for listing changes.
- Secure online listing portal
- Electronic document upload
- Automated reminders and notifications

5.6 BILLING AND COLLECTIONS REQUIREMENTS

The system shall:

- Generate annual tax bills
- Support supplemental and proration billing
- Calculate penalties and interest per NC statutes
- Support payment plans
- Track delinquent accounts
- Interface with financial/ERP system
- Provide escrow tracking
- Support multi-year delinquency tracking
- Generate statutory notices.
- Real-time integration with online payment processor
- Citizen payment portal
- API for payment data exchange
- Automated email/SMS notifications (optional)

5.7 LAND RECORDS REQUIREMENTS

The system shall:

- Track ownership history
- Support deed transfers and splits/combines
- Integrate with Register of Deeds data
- Synchronize with GIS parcel layer
- Maintain full parcel history audit.
- Automated deed import workflows
- API-based integration with recording systems

5.8 INFORMATION TECHNOLOGY REQUIREMENTS

- Support secure cloud-hosted (SaaS) or County-approved hosting
- Utilize SQL Server 2019+ or equivalent enterprise database
- Provide open API architecture
- Support integration with GIS and ERP systems

- Support configurable user security roles
- Provide field-level security controls
- Provide detailed audit logging
- Provide system health monitoring
- Provide disaster recovery plan
- Support multi-factor authentication
- Provide cybersecurity incident response plan
- Comply with NCGS §132 public records laws

If SaaS:

- Describe hosting environment
- Provide SOC 2 / relevant security certifications
- Provide uptime SLA

If on-prem:

- Provide hardware specifications
- Server requirements
- Storage requirements.

5.9 DATA MIGRATION AND CONVERSION SERVICES

The selected vendor shall:

- Conduct a full assessment of the County's current tax system
- Develop a comprehensive data conversion plan
- Migrate historical parcel, ownership, valuation, billing, and payment data
- Validate converted data through structured testing procedures
- Provide reconciliation reports prior to system acceptance.

5.10 IMPLEMENTATION SERVICES

Vendor shall provide:

- Dedicated project management
- Detailed implementation schedule and work breakdown structure
- System configuration workshops
- Integration testing
- User Acceptance Testing (UAT) support
- Go-live planning and stabilization support.

5.11 TRAINING AND KNOWLEDGE TRANSFER

Vendor shall provide:

- On-site and/or virtual administrator training
- End-user functional training by module
- Written documentation and user manuals
- Train-the-trainer options
- Ongoing training resources.

5.12 MAINTENANCE AND SUPPORT

Vendor shall provide:

- Ongoing technical support and helpdesk access
- Defined service level agreements (SLAs)
- Regular software updates and enhancements
- Legislative compliance updates
- Cybersecurity monitoring and patch management
- Disaster recovery and business continuity support.

6 TECHNICAL REQUIREMENTS

Union County has provided a detailed Technical Requirements Matrix as a separate Excel document to accompany this RFP.

The Technical Requirements Matrix is available at the following link and must be downloaded, completed, and submitted as part of the proposal package:

[Section 6 - Technical Requirements Matrix](#)

The completed file shall be submitted in Excel format and labeled:

“RFP 2026-058 – Technical Requirements Matrix – [Vendor Name].xlsx”

6.1.1 TECHNICAL REQUIREMENTS MATRIX SUBMISSION

All Offerors must complete the Technical Requirements Matrix in its entirety and submit it as a separate Excel file as part of their proposal package.

The Technical Requirements Matrix shall be uploaded as a separate file within the electronic submission portal.

The completed matrix shall:

- Include a response for every requirement listed
- Utilize the required response codes defined below
- Include comments where clarification is necessary
- Not be altered in structure, formatting, or numbering

Failure to complete the matrix in full may result in the proposal being deemed non-responsive.

6.1.2 RESPONSE CODES

Offerors must use the following response codes for each requirement:

Code	Definition
Y	Fully meets requirement as standard functionality
E	Meets requirement through existing configuration (no customization required)
RW	Meets requirement through report writer or standard reporting tools
F	Meets requirement through future planned functionality (must include timeline)
MN	Meets requirement through minor modification
MC	Meets requirement through major customization
N	Does not meet requirement

Only one (1) response code may be used per requirement.

6.1.3 VENDOR COMMENTS

Offerors may provide additional explanation in the comments column of the matrix.

Comments should:

- Clearly explain how the requirement is met
- Identify any assumptions or limitations
- Reference supporting documentation where applicable
- Identify any dependencies (e.g., third-party integrations)

6.1.4 COST IMPLICATIONS

All responses indicating:

- Configurable functionality (E)
- Minor customization (MN)
- Major customization (MC)

must be fully reflected in the Cost Proposal (Section F).

Customization costs shall be:

- Clearly identified
- Broken out by requirement number where applicable

6.1.5 ADDITIONAL CAPABILITIES

The Technical Requirements Matrix is intended to define minimum functional expectations.

Offerors are encouraged to:

- Identify additional capabilities not explicitly listed
- Highlight innovative features
- Describe functionality that improves efficiency, reporting, security, or citizen service

6.1.6 CONTRACT INCORPORATION

The completed Technical Requirements Matrix will be incorporated into the final contract.

All responses provided by the Offeror shall be considered binding commitments of the proposed solution.

7 DETAILED SUBMITTAL REQUIREMENTS AND INSTRUCTIONS

7.1 TERMS OF SUBMISSION

All material received from a person or company (“Respondent”) in response to this solicitation shall become the property of Union County and will not be returned to the Respondent. Any and all costs incurred by a Respondent in preparing, submitting, or presenting submissions are the Respondent’s sole responsibility and Union County shall not reimburse the Respondent. All responses to this solicitation will be considered a public record and subject to disclosure under applicable public records law.

Any material in a response which the Respondent considers a trade secret and exempt from disclosure as a public record under applicable law, including N.C.G.S. §§ 132-1.2 and 66-152, must be properly designated as a trade secret. In order to properly designate such material, the Respondent must: (i) submit any trade secret materials in a separate envelope, or file, from all other submitted material, being clearly marked as “Trade Secret – Confidential and Proprietary Information,” and (ii) stamp the same trade secret/confidentiality designation on each page of the materials therein which contain trade secrets.

To the extent consistent with public records law, Union County will make reasonable efforts to maintain the confidential nature of trade secrets, as determined by Union County and subject to the conditions set forth herein. Respondent understands and agrees by submitting a response to this solicitation, that if a request is made to review or produce a copy of any information in the Respondent’s materials which was properly labeled by the Respondent as a trade secret, Union County will notify the Respondent of the request and the date that such materials will be released to the requestor unless the Respondent obtains a court order enjoining that disclosure. If the Respondent fails to obtain the court order enjoining disclosure prior to that date, Respondent understands and agrees that Union County will release the requested information to the requestor on that date.

Furthermore, the Respondent also agrees to indemnify and hold harmless Union County and each of its officers, employees, and agents from all costs, damages, and expenses incurred in connection with refusing to disclose any material that has been designated as a trade secret by Respondent.

7.2 PROPOSAL FORMAT

The County desires all responses to be identical in format. While the County's format may represent a departure from the vendor's preference, the County requests adherence to the format. All responses are to be in the format described below.

Offerors should prepare their proposals in accordance with the instructions outlined in this section. Each Offeror is required to submit the proposal electronically – Refer to page 3, 2.2. Each section should be identified as described below. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the RFP.

The County may award a contract based on initial offers received without discussion of such offers. A proposer's initial offer should, therefore, be based on the most favorable terms available. The County reserves the right to contact proposers regarding cost and scope clarification at any time throughout the selection process.

The successful Offeror's proposal must include all responses to the requirements contained within this RFP and all appendices (if applicable) must be completed in their entirety.

By submitting a proposal, the successful Offeror agrees to all applicable provisions, terms and conditions associated with this RFP. This solicitation, the successful Offeror's submitted proposal, all appendices and attachments (if applicable), and stated terms and conditions may become part of the resulting contract.

The total length of the proposal should be no more than 100 pages “(*Technical Response Matrix does not count toward page limitation*), 8½ x 11 size paper with an 11-point minimum text size. Charts and graphs may be 10 points. All required forms are exempt from the page limit and must be submitted under the section identified below. Only one (1) complete proposal should be electronically submitted. The maximum document upload size is 20 MB. For any questions, contact the project representative on the front cover.

The utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, or tables should be numbered and clearly labeled. Response information should be limited to pertinent information only. Marketing and sales type information is not to be included.

Omissions and incomplete answers may be deemed unresponsive. Please initial any corrections. Respond to each item and provide supporting documentation and/or exhibits as requested or desired.

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

- **Section A** – Cover Letter
- **Section B** – Company Background and Relevant Experience
- **Section C** – Project Team
- **Section D** – Project Management, Technical Approach, and Quality Control
- **Section E** – References
- **Section F** – Cost Proposal
- **Section G** – Required Forms
 - Appendix B – Proposal Submission (signed)
 - Appendix C – Receipt and Anti-Collusion (signed)

7.2.1 SECTION A – COVER LETTER

In your cover letter, include the following information about your company.

1. Legal Company Name and DBA (if applicable)

Corporate Headquarters:

Address
Telephone Number
Website Address

Location Providing Service (if different from headquarters):

Address
Telephone Number

2. Name of Single Point of Contact
Title
Direct Telephone Number and/or extension
Direct Email Address
3. Name of Person with Binding Authority
Title
Address
Direct Telephone Number and/or extension
Email Address
4. Describe your firm's interest in this project and its experience providing comprehensive Government Property Tax Management Software solutions, specifically including CAMA, Personal Property, Billing & Collections, and integrated tax systems for North Carolina or similarly regulated jurisdictions.
5. Confirm that your company is financially solvent and able to operate for the next five (5) years without hindrance to the project or system operations.
6. Stipulate that the proposal price will be valid for a period of 180 days.

7. *Make the following representations and warranty in the cover letter, the falsity of which might result in rejection of its proposal:* “The information contained in this proposal or any part thereof, including any exhibits, schedules, and other documents and instruments delivered or to be delivered to the County, is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead the County as to any material facts.”

7.2.2 SECTION B – COMPANY BACKGROUND AND RELEVANT EXPERIENCE

This section provides each vendor with the opportunity to demonstrate how its history, organization, and partnerships differentiate it from other vendors. Careful attention should be paid to providing information relevant to Union County needs. Provide a concise profile of the Offeror’s organization to include the following:

- Provide corporate history, and number of years in business under the current organizational name and structure and services offered.
- The Offeror shall provide at least five (5) past projects of similar scope, preferably for local governments or public institutions.
- Scope of services, equipment used, and outcomes.
- Client contact info.
- Summary of company’s reputation, timeliness, responsiveness, and issue resolution.
- Disclosure of any litigation, claims, or formal disputes in the last five years.

7.2.3 SECTION C – PROJECT TEAM

1. Organizational chart specific to the Union County project.
2. Identification of key personnel including:
 - a. Project Manager
 - b. CAMA Functional Lead
 - c. Personal Property Lead
 - d. Billing & Collections Lead
 - e. Data Conversion Lead
 - f. Integration Specialist
 - g. Cybersecurity/Compliance Lead
 - h. Training Coordinator
3. Resume for each key personnel including:
 - a. Years of experience
 - b. Relevant certifications
 - c. Experience implementing North Carolina tax systems
 - d. Number of similar projects completed
4. Identification of any subcontractors and scope of work.
5. Estimated percentage of time each key personnel will dedicate to the project.

7.2.4 SECTION D – PROJECT MANAGEMENT, TECHNICAL APPROACH, AND QUALITY CONTROL

This section covers various aspects of the successful Offeror's approach to the proposed Project Team and implementation plan for this project. Please respond with as much relevant detail as possible given the information you've been provided in this RFP.

1. Implementation methodology (phased, parallel, hybrid).
2. Proposed project timeline including:
 - a. Discovery
 - b. Configuration
 - c. Data conversion
 - d. Testing
 - e. Training
 - f. Go-live
 - g. Post-go-live stabilization
3. Detailed data conversion methodology including:
 - a. Historical data conversion strategy
 - b. Data validation procedures
 - c. Reconciliation process
 - d. Rollback procedures
4. Integration approach for:
 - a. GIS
 - b. Tyler MUNIS (or successor ERP)
 - c. Payment processors
 - d. State systems (e.g., DOR, DMV)
5. Testing strategy including:
 - a. Unit testing
 - b. System testing
 - c. User Acceptance Testing
 - d. Parallel testing (if applicable)
6. Risk management plan.
7. Change management and user adoption strategy.
8. Quality assurance procedures.
9. Proposed Service Level Agreement (SLA) including:
 - a. Uptime guarantees
 - b. Response times

- c. Escalation procedures
- d. Disaster recovery (RPO/RTO definitions)

7.2.5 SECTION E – REFERENCES

Provide, at a minimum, three (3) comparable clients with whom your firm has an established relationship similar to the Scope of Work outlined in this RFP and include the information below.

- Name of Client/Firm
- Contact Name and Title
- Address
- Direct Phone Number
- Email Address
- Length of Relationship
- Summary of Software System Provided

7.2.6 SECTION F – COST PROPOSAL

Cost proposal shall be submitted using the County-provided Cost Proposal Sheet (Section 6.5).

Vendors shall:

1. Clearly separate one-time implementation costs from recurring annual costs.
2. Provide five (5) year total cost of ownership summary.
3. Identify any escalation rates.
4. Identify licensing model (SaaS vs perpetual).
5. Disclose all optional costs.
6. Disclose transaction-based fees (if applicable).

The County reserves the right to request cost clarification.

7.2.7 SECTION G – REQUIRED FORMS

Offerors **must complete and include signed copies** of the following documents:

- Appendix B – Proposal Submission (signed)
- Appendix C – Addenda Receipt and Anti-Collusion (signed)

7.3 SELECTION PARTICIPANTS

1. Maintaining the integrity of the RFP process is of paramount importance for the County. To this end, please do not contact any members of Union County or its staff regarding the subject matter of this RFP until a selection has been made, other than the County's designated contact person identified in the introduction to this RFP.
2. Representatives of Union County will read, review, and evaluate the RFP independently based on the evaluation criteria. Failure to abide by this requirement shall be grounds for disqualification from this selection process.
3. The County will establish an RFP Evaluation Team to review and evaluate the RFPs. The RFP Evaluation Team will assess the RFPs independently in

accordance with the published evaluation criteria. Union County reserves the right to conduct interviews with a shortlist of selected respondents.

4. At its sole discretion, the Owner may ask written questions of Offerors, seek written clarification, and conduct discussions with Offerors on the RFPs.
5. The County reserves the right to determine the suitability of proposals on the basis of a proposal meeting scope and submittal criteria listed in the RFP. Evaluation criteria and other relevant RFP information will be used to assist in determining the finalist Vendor.

7.4 EVALUATION SELECTION PROCESS

A weighted analysis of the evaluation criteria will be utilized to determine the Vendor that represents the best value solution for the County.

In the evaluation and scoring/ranking of Offerors, the County will consider the information submitted in the RFP as well as the meetings (if applicable) with respect to the evaluation criteria set forth in the RFP.

The initial evaluation criteria/factors and relative weights listed below will be used to recommend selection of the Proposed Offeror or for the purpose of selecting Short-Listed Offerors. The County may choose to award without engaging in interview discussions.

RFP Criteria	Weights
Company Background and Experience	25%
Project Team and Qualifications	30%
Project Management, Technical Approach, and Quality Control	30%
Cost Proposal & Compliance with Submittal Requirements	15%

Vendors may be invited to give a demonstration of the capabilities of the proposed solution to the Union County evaluation team. The successful Offeror’s demonstration (if requested), along with questions and answers, will be a critical component of the overall vendor evaluation.

After identification of Short-Listed Offerors, the County may or may not decide to invite Short-Listed Offerors to vendor demonstration/interviews. If interviews are scheduled with the Short-Listed Offerors, previous evaluation and rankings are not carried forward. For the purpose of selecting a Preferred Offeror, the evaluation criteria will be given the following relative weights:

Interview Criteria	Weights
Proposed Solution, Project Management and Staff	65%
Price, Quality and Relevance of Interview as it Relates to the Scope of the RFP	35%

Additional meetings may be held to clarify issues or to address comments, as deemed appropriate. Proposers will be notified in advance of the time and format of such meetings.

7.5 AWARD PROCEDURE

Union County has the right to reject any or all proposals, to engage in further negotiations with any Company submitting a proposal, and/or to request additional information or clarification. The County is not obligated to accept the lowest cost proposal. The County may accept the proposal that best serves its needs, as determined by County officials in their sole discretion.

The County reserves the right to make an award without further discussion of the proposals received. Therefore, it is important that the proposal be submitted initially on the most favorable terms.

A proposal may be rejected if it is incomplete. Union County may reject any or all proposals and may waive any immaterial deviation in a proposal.

More than one proposal from an individual, Offeror, partnership, corporation or association under the same or different names, will not be considered.

The County reserves the right to enter into negotiations with the top ranked Offeror. However, negotiations with the top ranked Offeror does not signify a commitment by Union County to execute a contract or to continue discussions.

The County reserves the right to terminate negotiations at any time and for any reason. The County may select and enter into negotiations with the next most advantageous Proposer if negotiations with the initially chosen Proposer are not successful.

The award shall be made in the best interest of the County. This procurement is conducted in accordance with N.C.G.S. §143-129.8 governing information technology goods and services. The County reserves the right to accept other than the most financially advantageous proposal.

The award document will be a Contract incorporating, by reference, all the requirements, terms and conditions of the solicitation and the Offeror's proposal as negotiated.

7.6 CONFLICT CERTIFICATION

The Offeror must certify that it does not have any actual or potential conflicts of interest with, or adversarial litigation against the County or any of its officers or employees. During the course of the contractual relationship formed pursuant to this solicitation, any such conflict of interest, whether newly arising or newly discovered, must be disclosed to the County in writing.

8 GENERAL CONDITIONS AND REQUIREMENTS

8.1 TERMS AND CONDITIONS

The contract award will have an initial term of four (4) years (beginning at final acceptance) with four (4) two-year renewal options at the County's discretion, pending annual budget approval.

Union County has the right to reject any or all proposals, to engage in further negotiations with any Company submitting a proposal, and/or to request additional information or clarification. The County is not obligated to accept the lowest cost proposal. The County may accept that proposal that best serves its needs, as determined by County officials in their sole discretion.

All payroll taxes, liability and worker's compensation are the sole responsibility of the Offeror. The Offeror understands that an employer/employee relationship does not exist under this contract.

All proposals submitted in response to this request shall become the property of Union County and as such may be subject to public review.

8.2 CONTRACTUAL OBLIGATIONS

The contents of this Proposal and the commitments set forth in the selected Proposal(s) shall be considered contractual obligations if a contract ensues. Failure to accept these obligations may result in cancellation of the award. All legally required terms and conditions shall be incorporated into final contract agreements with the selected Service Provider(s).

8.3 SUB-CONTRACTOR/PARTNER DISCLOSURE

If the proposal by any Company requires the use of subcontractors, partners, and/or third-party products or services, this must be clearly stated in the proposal. The Company submitting the proposal shall remain solely responsible for the performance of all work, including work that is done by sub-contractors.

8.4 EXCEPTION TO THE PROPOSAL

An "exception" is defined as the Service Provider's inability or unwillingness to meet a term, condition, specification, or requirement in the manner specified in the Proposal. All exceptions taken must be identified and explained in writing in the proposal and must specifically reference the relevant section(s) of this Proposal. Other than exceptions that are stated in compliance with this Section, each proposal shall be deemed to comply with all terms, conditions, specifications, and requirements of this Proposal. If the Service Provider provides an alternate solution when taking an exception to a requirement, the benefits of this alternate solution and impact, if any, on any part of the remainder of the Service Provider's solution, must be described in detail.

8.5 MODIFICATION OR WITHDRAWAL OF PROPOSAL

Prior to the scheduled closing time for receiving proposals, any Vendor may withdraw their proposal. After the scheduled closing time for receiving proposals, no proposal may be withdrawn for 120 days. Only written requests for the modification or correction of a previously submitted proposal that are addressed in the same manner as proposals and are received by the County prior to the closing time for receiving proposals will be accepted. The proposal will be corrected in accordance with such written requests, provided that any such written request is in a sealed envelope that is plainly marked

“Modification of Proposal” – with solicitation number and name on the front of the envelope. Oral, telephone, or fax modifications or corrections will not be recognized or considered.

8.6 EQUAL EMPLOYMENT OPPORTUNITY

All Offerors will be required to follow Federal Equal Employment Opportunity (EEO) policies. Union County will affirmatively assure that on any project constructed pursuant to this advertisement, equal employment opportunity will be offered to all persons without regard to race, color, creed, religion, national origin, sex, and marital status, status with regard to public assistance, membership or activity in a local commission, disability, sexual orientation, or age.

8.7 MINORITY BUSINESSES (MBE) OR DISADVANTAGED BUSINESSES (DBE)

It is the policy of Union County that Minority Businesses (MBEs), Disadvantaged Business Enterprises (DBEs) and other small businesses shall have the opportunity to compete fairly in contracts financed in whole or in part with public funds. Consistent with this policy, Union County will not allow any person or business to be excluded from participation in, denied the benefits of, or otherwise be discriminated against in connection with the award and performance of any contract because of sex, race, religion, or national origin.

8.8 LICENSES

The successful Offeror(s) shall have and maintain a valid and appropriate business license (if applicable), meet all local, state, and federal codes, and have current all required local, state, and federal licenses.

8.9 E-VERIFY

E-Verify is the federal program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program, used to verify the work authorization of newly hired employees pursuant to federal law. Vendor/Offeror shall ensure that Offeror and any Sub-Contractor performing work under this contract: (i) uses E-Verify if required to do so; and (ii) otherwise complies with applicable law.

8.10 DRUG-FREE WORKPLACE

During the performance of this Request, the Offeror agrees to provide a drug-free workplace for their employees; post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the workplace and specify the actions that will be taken against employees for violations of such prohibition; and state in all solicitations or advertisements for employees placed by or on behalf of the Offeror that the Offeror maintains a drug-free workplace.

For the purposes of this section, “drug-free workplace” means a site for the performance of work done in connection with a specific contract awarded to a Offeror/Offerors in

accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the Request.

8.11 INSURANCE

One or more of the following insurance limits may be required if it is applicable to the project. The County reserves the right to require additional insurance depending on the nature of the agreement.

At Contractor's sole expense, Contractor shall procure and maintain the following minimum insurances with insurers authorized to do business in North Carolina and rated A-VII or better by A.M. Best, or as otherwise authorized by the Union County Risk Manager.

A. WORKERS' COMPENSATION

Statutory (coverage for three or more employees) limits covering all employees, including Employer's Liability with limits of:

\$500,000	Each Accident
\$500,000	Disease - Each Employee
\$500,000	Disease - Policy Limit

B. COMMERCIAL GENERAL LIABILITY

(for any agreement unless otherwise waived by the Risk Manager)
Covering Ongoing and Completed Operations involved in this Agreement.

\$2,000,000	General Aggregate
\$2,000,000	Products/Completed Operations Aggregate
\$1,000,000	Each Occurrence
\$1,000,000	Personal and Advertising Injury Limit

C. COMMERCIAL AUTOMOBILE LIABILITY

(for any agreement involving the use of a contractor vehicle while conducting services associated with the agreement)

\$1,000,000	Combined Single Limit - Any Auto
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D. PROFESSIONAL LIABILITY

(only for any agreement providing professional service such as engineering, architecture, surveying, consulting services, etc.)

\$1,000,000	Claims Made
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Contractor shall provide evidence of continuation or renewal of Professional Liability Insurance for a period of two (2) years following termination of the Agreement.

E. NETWORK SECURITY & PRIVACY LIABILITY (CYBER)

(for any agreement involving software applications)

\$1,000,000 Claims Made

Contractor shall provide evidence of continuation or renewal of Network Security & Privacy Liability Insurance for a period of two (2) years following termination of the Agreement.

ADDITIONAL INSURANCE REQUIREMENTS

- A. The Contractor's General Liability policy shall be endorsed, specifically or generally, to include the following as Additional Insured:

UNION COUNTY, ITS OFFICERS, AGENTS AND EMPLOYEES ARE INCLUDED AS ADDITIONAL INSURED WITH RESPECTS TO THE GENERAL LIABILITY INSURANCE POLICY.

Additional Insured status for Completed Operations shall extend for a period of not less than three (3) years from the date of final payment.

- B. Before commencement of any work or event, Contractor shall provide a Certificate of Insurance in satisfactory form as evidence of the insurances required above.
- C. Contractor shall have no right of recovery or subrogation against Union County (including its officers, agents and employees).
- D. It is the intention of the parties that the insurance policies afforded by contractor shall protect both parties and be primary and non-contributory coverage for any and all losses covered by the above-described insurance.
- E. Union County shall have no liability with respect to Contractor's personal property whether insured or not insured. Any deductible or self-insured retention is the sole responsibility of Contractor.
- F. Notwithstanding the notification requirements of the Insurer, Contractor hereby agrees to notify County's Risk Manager at 500 N. Main Street # 130, Monroe, NC 28112, within two (2) days of the cancellation or substantive change of any insurance policy set out herein. Union, in its sole discretion, may deem failure to provide such notice as a breach of this Agreement.
- G. The Certificate of Insurance should note in the Description of Operations the following:

Department: _____
Contract #: _____

- H. Insurance procured by Contractor shall not reduce nor limit Contractor's contractual obligation to indemnify, save harmless and defend Union County for claims made or suits brought which result from or are in connection with the performance of this Agreement.

- I. Certificate Holder shall be listed as follows:

Union County
Attention: Risk Management Department
500 N. Main Street
Monroe, NC 28112

- J. If Contractor is authorized to assign or subcontract any of its rights or duties hereunder and in fact does so, Contractor shall ensure that the assignee or subcontractor satisfies all requirements of this Agreement, including, but not limited to, maintenance of the required insurances coverage and provision of certificate(s) of insurance and additional insured endorsement(s), in proper form prior to commencement of services.

8.12 INDEMNIFICATION

Contractor agrees to protect, defend, indemnify and hold Union County, its officers, employees and agents free and harmless from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees or other expenses or liabilities of every kind and character arising out of or relating to any and all claims, liens, demands, obligations, actions, proceedings, or causes of action of every kind in connection with or arising out of this agreement and/or the performance hereof that are due, in whole or in part, to the negligence of the Contractor, its officers, employees, subcontractors or agents. Contractor further agrees to investigate, handle, respond to, provide defense for, and defend the same at its sole expense and agrees to bear all other costs and expenses related thereto.

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9 APPENDIX A – COST PROPOSAL

RFP 2026-058

Union County Comprehensive Property Tax Software Solution

SUBMIT WITH PROPOSAL

All pricing shall be valid for a minimum of 180 days. Vendors may attach supplemental pricing detail sheets

9.1 BASELINE SOFTWARE COSTS

Baseline Software Modules	One-Time Costs	Year 1	Year 2	Year 3	Year 4	Year 5
CAMA Module						
Personal Property Module						
Billing & Collections Module						
Citizen Web Portal						
Report Writer / Analytics						
Standard Interfaces (GIS, ERP, Payment Processor)						
Additional Interfaces (Specify)						
Other Software Components (Specify)						
Total Baseline Software Cost						

9.2 IMPLEMENTATION & PROFESSIONAL SERVICES

Professional Services	One-Time Costs	Year 1	Year 2	Year 3	Year 4	Year 5
Project Management						
System Configuration						
Data Conversion						
Integration Services						
Testing & Go-Live Support						
Training (include travel if applicable)						
Other (Specify)						

Professional Services	One-Time Costs	Year 1	Year 2	Year 3	Year 4	Year 5
Total Professional Services Cost						

9.3 ONGOING MAINTENANCE & HOSTING

Ongoing Costs	Year 1	Year 2	Year 3	Year 4	Year 5
Annual Software Maintenance (if perpetual model)					
SaaS Subscription (if applicable)					
Cloud Hosting / Infrastructure					
Security Monitoring / Compliance					
Legislative Updates					
Ongoing Support & Helpdesk					
Other (Specify)					
Total Annual Ongoing Cost					

9.4 OPTIONAL COSTS (IF APPLICABLE)

Optional Services	One-Time Costs	Annual Cost
Additional User Licenses		
Future Module Add-ons		
Advanced Analytics / BI Tools		
Additional Training		
Other (Specify)		

9.5 COST SUMMARY

Description	Amount
Total One-Time Costs	
Total Year 1 Cost	
Total Year 2 Cost	
Total Year 3 Cost	
Total Year 4 Cost	
Total Year 5 Cost	

Description	Amount
Total Five-Year Cost	

9.6 PRICING DISCLOSURES

Vendor must disclose:

- Annual escalation percentage (if any)
- Maximum escalation cap
- Licensing model (SaaS subscription / Perpetual license)
- User-based vs enterprise pricing model
- Data storage limitations (if any)
- Overage costs (if any)
- Payment processing transaction fees (if applicable)

Authorized Signature: _____

Date: _____

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10 APPENDIX B – PROPOSAL SUBMISSION

**RFP 2026-058
Union County Comprehensive Property Tax Software Solution**

SUBMIT WITH PROPOSAL

This Proposal is submitted by:

Company Legal Name: _____

Representative Name: _____

Representative Signature: _____

Representative Title: _____

Address: _____

County/State/Zip: _____

Email Address: _____

Phone Number: _____

Website Address: _____

It is understood that Union County reserves the right to reject any and all proposals, to make awards according to the best interest of the County, to waive formalities, technicalities, to recover and re-advertise this project. Proposal is valid for 180 days. Proposal is submitted by an executive of the company that has authority to contract with Union County, NC.

Name: _____

Title: _____

Signature: _____

Date: _____

11 APPENDIX C – ADDENDUM AND ANTI-COLLUSION

RFP 2026-058 Union County Comprehensive Property Tax Software Solution

SUBMIT WITH PROPOSAL

Please acknowledge receipt of all addenda by including this form with your Proposal. Any questions or changes received will be posted as an addendum on www.unioncountync.gov and/or <https://evp.nc.gov> . It is your responsibility to check for this information.

Addendum No.	Date Downloaded
_____	_____
_____	_____
_____	_____
_____	_____

12 APPENDIX D – VENDOR PAYMENT NOTIFICATION

RFP 2026-058

Union County Comprehensive Property Tax Software Solution
Informational Purposes Only - Do not submit with proposal

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Finance Department

500 North Main Street Suite #714
Monroe, NC 28112 T. 704-283-3813
www.unioncountync.gov

ATTENTION: ACCOUNTS PAYABLE VENDORS

As part of our Fraud Prevention Program, Union County now prefers two methods for payments to vendor accounts. These methods allow for faster and easier payments to vendors.

The first and preferred method available is to accept a VISA card payment from the County. If you accept payment via VISA, payment is made at the time of the transaction or upon receipt and approval of the invoice.

The second method is an Electronic Funds Transfer. (EFT) This means that you will receive payment of invoices due directly into your bank account. With this method, you will get an email confirmation giving you the date, invoice numbers, and total amount paid. Your payment will be available to you on Monday (or the first banking day if Monday is a bank holiday) following receipt of an approved invoice from the County department invoiced.

An EFT Enrollment Form to enroll in the program is attached for your convenience. You can also visit the Union County website at www.unioncountync.gov at any time to get a new form if your banking information changes. If the banking information changes and you do not notify us, it will delay receipt of payment for invoices.

If you wish to receive payment via the County's VISA card, please contact Heather Howey at 704-283-3539, or send an email to ap@unioncountync.gov and you will be added to the list of vendors accepting the VISA card method of payment.

Union County prefers all vendors participate in one of the two methods described above.

Thank you in advance for your participation.

13 APPENDIX E – TEMPLATE CONTRACT

RFP 2026-058

Union County Comprehensive Property Tax Software Solution

Informational Purposes Only - Do not submit with proposal

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STATE OF NORTH CAROLINA

AGREEMENT

COUNTY OF UNION

THIS AGREEMENT is made and entered into as of _____, by and between UNION COUNTY, a political subdivision of the State of North Carolina, whose address is 500 North Main Street, Monroe, NC 28112, hereinafter “Union,” and [Contractor’s full legal name], a [type of business (corporation, limited liability company, etc.) and state where incorporated], whose address is _____, hereinafter “Contractor.”

W I T N E S S E T H

WHEREAS, Union desires that Contractor perform certain [briefly describe services here] services; and

WHEREAS, Contractor is willing to perform such services as described in this Agreement.

NOW, THEREFORE, in consideration of the mutual covenants and agreements hereinafter set forth, the parties hereto do each contract and agree with the other as follows:

1. SERVICES PERFORMED. Contractor agrees to perform the services as set forth in the attached Scope of Work [or, if the full RFP is to be attached as the scope of work, state the RFP number and full RFP title], which is incorporated herein by reference (hereinafter the “Services”), in accordance with the terms of this Agreement.
2. FEE AND PAYMENT SCHEDULE. Union shall pay Contractor [insert payment amount or rate] for performance of the Services. Contractor shall invoice Union on a monthly basis for Services performed, or upon such other schedule as may be agreed upon by the parties. Payment is due within thirty (30) days of receipt of an accurate invoice by Union’s Finance Division. All payments shall be conditioned upon appropriation by the Union County Board of Commissioners of sufficient funds for each request for services.
3. TERM AND TERMINATION. The Effective Date is the date of mutual execution of this Agreement. This Agreement shall have a term of [insert agreement time length] (the “Initial Term”). [The following sentence to be used only if renewals might be needed or desired, and then only if the RFP lists the possible number of renewals. If the contract is just for a single term, this sentence may be deleted.] Upon completion of the Initial Term, Union may, in its sole discretion, elect to renew this Agreement for up to ___[number of possible additional terms, as stated in the RFP] additional ___[number of years in each renewal term]-year terms, each a “Renewal Term,” upon written notice to the Contractor. Union may terminate this Agreement at any time, without cause, upon provision of ten (10) days’ written notice to Contractor. In the event of termination without cause, Contractor shall be paid for services performed to the date of notification of termination by Union.
4. OWNERSHIP OF DOCUMENTS. All deliverables and any other contract documents prepared by Contractor, or any subcontractors or subconsultants under the terms of this Agreement (“the Documents”), shall be the property of Union. Contractor further acknowledges that Union is subject to Chapter 132 of the North Carolina General Statutes, the Public Records Act (the

“Act”), and that this Agreement, as well as any of the Documents as defined herein, shall be a public record as defined in such Act, and as such, will be open to public disclosure and copying.

5. INSURANCE. The attached Exhibit A, Insurance Requirements, is incorporated herein by reference.

6. INDEMNIFICATION. Contractor agrees to protect, defend, indemnify and hold Union, its officers, employees and agents free and harmless from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees or other expenses or liabilities of every kind and character arising out of or relating to any and all claims, liens, demands, obligations, actions, proceedings, or causes of action of every kind in connection with or arising out of this Agreement and/or the performance hereof that are due, in whole or in part, to the negligence of Contractor, its officers, employees, subcontractors or agents. Contractor further agrees to investigate, handle, respond to, provide defense for, and defend the same at its sole expense and agrees to bear all other costs and expenses related thereto.

7. DECLARATION BY CONTRACTOR. Contractor declares that Contractor has complied with all federal, state and local laws regarding business permits, certificates, and licenses that may be required to carry out the work to be performed under this Agreement.

8. FEDERAL, STATE, AND LOCAL TAXES. Neither federal, nor state, nor local income tax nor payroll tax of any kind shall be withheld or paid by Union on behalf of Contractor or the employees of Contractor. Contractor shall not be treated as an employee with respect to the services performed hereunder for federal or state tax purposes.

9. NOTICE TO CONTRACTOR REGARDING ITS TAX DUTIES AND LIABILITIES. Contractor understands that Contractor is responsible to pay, according to law, Contractor’s income tax. If Contractor is not a corporation, Contractor further understands that Contractor may be liable for self-employment (social security) tax, to be paid by Contractor according to law.

10. FRINGE BENEFITS. Because Contractor is engaged in Contractor’s own independently established business, Contractor is not eligible for, and shall not participate in, any employee pension, health or other fringe benefit plan of Union.

11. UNION NOT RESPONSIBLE FOR WORKERS’ COMPENSATION. No workers’ compensation insurance shall be obtained by Union concerning Contractor or the employees of Contractor. Contractor shall comply with the workers’ compensation law concerning Contractor and the employees of Contractor.

12. NO AUTHORITY TO BIND UNION. Contractor has no authority to enter into contracts or agreements on behalf of Union. This Agreement does not create a partnership or any form of agency between the parties.

13. ASSIGNMENT. Neither Union nor Contractor shall assign, sublet or transfer any rights under or interest in this Agreement (including, but without limitation, monies that may become due or monies that are due) without the written consent of the other, except to the extent that any assignment, subletting or transfer is mandated by law or the effect of this limitation may be restricted by law. Unless specifically stated to the contrary in any written consent to assignment, no

assignment shall release or discharge the assignor from any duty or responsibility under this Agreement.

14. NON-WAIVER. The failure of either party to exercise any of its rights under this agreement for a breach thereof shall not be deemed to be a waiver of such rights or a waiver of any subsequent breach.

15. HOW NOTICES SHALL BE GIVEN. Any notice given in connection with this agreement shall be given in writing and shall be delivered either by hand to the party or by certified mail, return receipt requested, to the party at the party's address stated herein. Any party may change its address stated herein by giving notice of the change in accordance with this paragraph.

16. APPLICABLE LAW AND JURISDICTION. This Agreement shall be construed and enforced in accordance with the laws of the State of North Carolina. The parties to this Agreement confer exclusive jurisdiction of all disputes arising hereunder upon the General Courts of Justice of Union County, North Carolina.

17. COMPLETE AGREEMENT. This Agreement contains the complete agreement of the parties regarding the terms and conditions of the Agreement, and there are no oral or written conditions, terms, warranties, understandings or other agreements pertaining thereto which have not been incorporated herein. This Agreement may be modified only by written instrument duly executed by both parties, or their respective successors in interest.

18. SEVERABILITY. The provisions hereof are severable, and should any provision be determined to be invalid, unlawful or otherwise null and void by any court of competent jurisdiction, the other provisions shall remain in full force and effect and shall not thereby be affected unless such ruling shall make further performance hereunder impossible or impose an unconscionable burden upon one of the parties.

19. AUTHORITY. Each party warrants that it has the corporate or other organizational power and authority to execute, deliver and perform this Agreement. Each party further warrants that the execution, delivery and performance by it of the Agreement has been duly authorized and approved by all requisite action of the party's management and appropriate governing body.

20. E-VERIFY. E-Verify is the federal program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program, used to verify the work authorization of newly hired employees pursuant to federal law. Contractor shall ensure that Contractor and any subcontractor performing work under this Agreement: (i) uses E-Verify if required to do so by North Carolina law; and (ii) otherwise complies with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes. A breach of this provision by Contractor will be considered a breach of this Agreement, which entitles Union to terminate this Agreement, without penalty, upon notice to Contractor.

[Signatures follow on the next page.]

IN WITNESS WHEREOF, the parties hereto, acting under authority of their respective governing bodies, have hereunto set their hands and seals, and have caused this Agreement to be duly executed, this the day and year first above written.

UNION COUNTY

By: _____ (SEAL)
Brian W. Matthews, County Manager

[CONTRACTOR'S FULL LEGAL NAME]

By: _____ (SEAL)

Approved as to Legal Form _____

This instrument has been preaudited in the manner required by The Local Government Budget and Fiscal Control Act.

Deputy Finance Officer

Exhibit A
Insurance Requirements

I. BASIC INSURANCE REQUIREMENTS. At Contractor's sole expense, Contractor shall procure and maintain the following minimum insurances with insurers authorized to do business in North Carolina and rated A-VII or better by A.M. Best, or as otherwise authorized by the Union County Risk Manager.

A. WORKERS' COMPENSATION

Statutory (coverage for three or more employees) limits covering all employees, including Employer's Liability with limits of:

\$500,000	Each Accident
\$500,000	Disease - Each Employee
\$500,000	Disease - Policy Limit

B. COMMERCIAL GENERAL LIABILITY

Covering all operations involved in this Agreement.

\$2,000,000	General Aggregate
\$2,000,000	Products/Completed Operations Aggregate
\$1,000,000	Each Occurrence
\$1,000,000	Personal and Advertising Injury Limit

C. COMMERCIAL AUTOMOBILE LIABILITY

\$1,000,000	Combined Single Limit - Any Auto
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D. PROFESSIONAL LIABILITY

\$1,000,000	Claims Made
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Contractor shall provide evidence of continuation or renewal of Professional Liability Insurance for a period of two (2) years following termination of the Agreement.

E. POLLUTION LIABILITY INSURANCE

\$1,000,000	Claims Made
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Contractor shall provide evidence of continuation or renewal of Pollution Liability Insurance for a period of two (2) years following termination of the Agreement.

F. NETWORK SECURITY & PRIVACY LIABILITY (CYBER)

\$1,000,000 Claims Made
\$3,000,000 Aggregate Limit

Contractor shall provide evidence of continuation or renewal of Network Security & Privacy Liability Insurance for a period of two (2) years following termination of the Agreement.

II. **ADDITIONAL INSURANCE REQUIREMENTS.**

A. The Contractor's General Liability policy shall be endorsed, specifically or generally, to include the following as Additional Insured:

UNION COUNTY, ITS OFFICERS, AGENTS AND EMPLOYEES ARE INCLUDED AS ADDITIONAL INSURED WITH RESPECT TO THE GENERAL LIABILITY INSURANCE POLICY.

B. Before commencement of any work or event, Contractor shall provide a Certificate of Insurance in satisfactory form as evidence of the insurances required above.

C. Contractor shall have no right of recovery or subrogation against Union County (including its officers, agents and employees).

D. It is the intention of the parties that the insurance policies afforded by Contractor shall protect both parties and be primary and non-contributory coverage for any and all losses covered by the above-described insurance.

E. Union County shall have no liability with respect to Contractor's personal property whether insured or not insured. Any deductible or self-insured retention is the sole responsibility of Contractor.

F. Notwithstanding the notification requirements of the Insurer, Contractor hereby agrees to notify County's Risk Manager at 500 North Main Street, Monroe, NC 28112, within two (2) days of the cancellation or substantive change of any insurance policy set out herein. Union, in its sole discretion, may deem failure to provide such notice as a breach of this Agreement.

G. The Certificate of Insurance should note in the Description of Operations the following:

Department: _____
Contract #: _____

H. Insurance procured by Contractor shall not reduce nor limit Contractor's contractual obligation to indemnify, save harmless and defend Union County for claims made or suits brought which result from or are in connection with the performance of this Agreement.

I. Certificate Holder shall be listed as follows:

Union County
Attention: Risk Manager
500 North Main Street
Monroe, NC 28112

J. If Contractor is authorized to assign or subcontract any of its rights or duties hereunder and in fact does so, Contractor shall ensure that the assignee or subcontractor satisfies all requirements of this Agreement, including, but not limited to, maintenance of the required insurances coverage and provision of certificate(s) of insurance and additional insured endorsement(s), in proper form prior to commencement of services.