GOVERNMENTAL PROPERTY TAX MANAGEMENT SOFTWARE

REQUEST FOR PROPOSALS

RFP NO: 24-1004

catawba county

MAKING. LIVING. BETTER.

Date of Issue: September 25, 2023

Proposals Due: October 30, 2023

Time: 3:00 PM ET

Issued for:
Catawba County Tax Department
25 Government Drive
Newton, North Carolina 28658

Issued by:
Catawba County Purchasing Manager
25 Government Drive
Newton, North Carolina 28658
(828) 465-8224

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SECTION 1 – INTRODUCTION

1.1 INTRODUCTION

Pursuant to N.C.G.S § 143-129.8 and N.C.G.S § 143-135.9, Catawba County (hereinafter "County") is soliciting Request for Proposals (hereinafter "RFP's") from qualified software companies interested in providing a "State of the Art" automated Computer Assisted Mass Appraisal (CAMA) with Field Management Solution, along with tax billing/collections and land record software. The purpose of this RFP is to contract with a qualified software company that can provide a proven solution to streamline operations and system performance in the county's Tax Office.

The County desires one integrated application that may consist of several modules with standard database architecture, and a modern ease to navigate User Interface (UI). In addition, the County desires that the software have an open architecture that will enable the use of an API or similar functionality to ensure seamless integration into GIS system (currently ESRI) and ERP systems (currently Oracle PeopleSoft).

1.2 BACKGROUND

Catawba County is a unit of local government in the State of North Carolina with a current population of approximately 163,000. Catawba County has a commissioner-manager form of government. The five members of the Board of County Commissioners are elected in a partisan election by qualified voters for overlapping four-year terms of office.

The County is comprised of a total of 89,400 parcels, which can be broken down into 64% residential, 10% commercial and 26% agricultural and unimproved parcels. Catawba County Tax Office also lists, appraises, and assesses over 30,515 personal property records, including 6,621 businesses. The County is required to perform a revaluation at least every eight years; however, Catawba County has elected to perform revaluations every four years. The last revaluation was conducted in 2023.

In Fiscal Year 23-24, the estimated value for real property is $23,379,413,057 and personal property is valued at $4,119,360,949.

There are a total of 28 employees in the Tax Administration Office.

SECTION 2 – PROPOSAL INFORMATION

2.1 GENERAL INFORMATION

This RFP is intended to provide software companies with a common, uniform set of instructions to assist them in the development of their proposals and to provide a uniform method for the County to fairly evaluate proposals and subsequently select a proposal that provides a fully integrated government tax management software solution. Proposers are encouraged to initiate preparation of proposals immediately upon receipt of the RFP in order for all relevant questions and information needs to be identified and answered, and to allow adequate time to prepare a comprehensive and completed response.

This RFP is comprised of the base RFP document, any attachments, and any addenda released before Contract award, which are incorporated herein by reference.

2.2 RFP SCHEDULE

The table below shows the *intended* schedule for this RFP. County will make every effort to adhere to this schedule.

Event	Responsibility	Date and Time
Issue RFP	County	September 25, 2023
Submit Written Questions	Proposer	October 16, 2023 at 5:00 PM
Provide Responses to Questions	County	October 19, 2023 at 5:00 PM
Submit Sealed Proposals	Proposer	October 30, 2023 at 3:00 PM
Contract Award	County	TBA
Contract Effective Date	County	January 1, 2024

2.3 PROPOSAL QUESTIONS

Upon review of the RFP documents, Proposer(s) may have questions to clarify or interpret specifications in order to submit the best proposal possible. To accommodate the Proposal Questions process, Proposer shall submit any such questions by the above due date. Written questions shall be emailed to tinawright@catawbacountync.gov by the date and time specified above. Proposer should enter "RFP #: 24-1004 – Questions" as the subject for the email. Questions received prior to the submission deadline date, the County's response, and any additional terms deemed necessary by the County will be posted in the form of an addendum to the County website, https://www.catawbacountync.gov/county-services/purchasing/proposal-notices/ and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any County personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Proposer shall rely only on written material contained in an Addendum to this RFP.

2.4 PROPOSAL SUBMITTAL

Sealed proposals, subject to the conditions made a part hereof, will be received at the address indicated in the table below, no later than **3:00 PM on October 30, 2023**. Each envelope should be clearly labeled with: RFP 24-1004 – Governmental Tax Management Software.

Mailing address for delivery of proposal via US Postal Service	Office Address of delivery by any other method (hand delivery, overnight, or any other carrier)
RFP No: 24-1004 Catawba County Government Center Attn: Purchasing Department Post Office Box 389 Newton, North Carolina 28658	RFP No: 24-1004 Catawba County Government Center Attn: Purchasing Department 25 Government Drive Newton, North Carolina 28658

IMPORTANT NOTE: All proposals shall be physically delivered to the office address listed above on or before the submission deadline in order to be considered timely, regardless of the method of delivery. **This is an absolute requirement.** All risk of late arrival due to unanticipated delay—whether delivered by hand, U.S. Postal Service, courier or other delivery service is entirely on the Proposer(s). It is the sole responsibility of the Proposer to have proposals physically in this Office by the specified time and date above. Attempts to submit a proposal via facsimile (FAX) machine, telephone or electronic means, including but not limited to email, in response to this RFP will **not** be accepted.

Proposals must be submitted with **one (1) original and one (1) electronic copy on flash drive.** Each Proposer must thoroughly examine the RFP to ensure that the Proposer can meet all requirements of this RFP. When responding to this RFP, please follow all instructions carefully. Failure to follow these instructions in your proposal may be considered a non-responsive submission and may result in immediate elimination from further consideration.

Critical updated information may be included in Addenda to this RFP. It is important that all Proposers responding to this RFP periodically check the County website for any Addenda that may be issued prior to the proposal due date or complete Attachment E – Intent to Propose and submit back to County at tinawright@catawbacountync.gov to be notified when Addenda are issued. All Proposers shall be deemed to have read and understood all information in this RFP and all Addenda thereto.

Offers submitted pursuant to this RFP are valid for ninety (90) days after Proposal due date. Proposals received will remain confidential until a contact is awarded.

2.5 REJECTION OF PROPOSALS

Catawba County reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP. The County also reserves the right at its sole discretion to waive minor administrative irregularities contained in any proposal. Failure to comply with any of the terms and conditions of this RFP will result in rejection of a proposal. The County reserves the right to negotiate any and all terms with the successful Proposer.

2.6 PROPRIETARY INFORMATION

Trade secrets or proprietary information submitted by Proposer in connection with a procurement transaction shall not be subject to the public disclosure under the North Carolina Public Records Act pursuant to NCGS § 66-152(3). However, the Proposer must invoke the protection of this section prior to or upon submission of the data or other materials and must identify the data on other materials to be protected and state the reasons why protection is necessary. DO NOT mark every page as confidential. **Each individual page that is a trade secret or proprietary information must be labeled "Confidential" in the top right corner.** However, under no circumstances shall price information be designated as confidential.

2.7 PROPOSAL CONTENTS

Proposers must carefully read the information requested in this "Proposal Contents" section and submit a complete proposal responding to each request for information. In order to evaluate responses efficiently and equitably, responses must be tabbed as identified below. Failure to submit information requested may render your proposal non-responsive.

Tab 1: Executive Summary

- Provide an executive summary of the vendor's proposal. The summary should highlight aspects of the proposal which make it superior or unique in addressing the needs and specifications of Catawba County.

Tab 2: Introduction: Company Information

- Provide a concise description of your company, including origin, year established, background, current size, type of company (individual, partnership, corporation, etc.) and list the names of all partners, principals, etc.

- Business name and address, including telephone, email address, and website address. Include any former company name(s) and year(s) established, if applicable.
- The name, title, address, and telephone number of the company's authorized negotiator. The person identified must be empowered to make binding commitments for the company.

Tab 3: Experience and Operations Summary

- **Understanding:** Cleary state your understanding of the services requested in this RFP and your proposed Solution's ability to meet the specifications, including capabilities, features, and limitations, as described herein.
- **Experience:** Describe experience with providing the Solution requested in this RFP.
- **Previous and Current Contracts:** Provide a list of completed contracts held with public entities within the last five (5) years. In addition, provide a list of current contracts, including award date and date for anticipated completion for similar services.
- Provide a detailed summary of any regulatory sanctions, license agency sanctions, litigation, claim(s), contract dispute(s) filed by or against the Proposer in the past five (5) years that are related to the services that the Proposer provides in the regular course of business. If none, please state that.

Tab 4: Project Management

- **Key Personnel of Proposer:** Proposer must provide a Project Team Organization and Staffing plan, including contact information and resumes for key personnel.
- **Point of Contact:** All project management and coordination on behalf of the County shall be through a single point of contact designated as the County Project Manager. Proposer shall also designate a Project Manager who will provide a single point of contact for management and coordination of the Proposer's work. Provide that information with you Key Personnel of Proposer information.
- **Project Implementation Plan.** Proposer must provide a detailed schedule and associated Work Breakdown Structure (WBS) that includes phases, activities, tasks, milestones, deliverables, and resource management.
- Indicate capacity to successfully manage the Project.
- **Security:** Describe what security policies are in place to protect citizen PI/PII (non-public data.) In addition, describe any information security breaches that may have occurred within the last ten (10) years.

Tab 5: Cost Proposal

IMPORTANT: Separate pricing is required for each individual module. On Attachment B: Proposal Form and Offer Certification, provide pricing associated with implementation services, training services, any required hardware, interfaces, maintenance, support, etc. In addition to completing this form, please provide on a separate sheet a detailed itemization for all costs associated with the items and services proposed pursuant to this RFP.

- Payment Terms: If progress payments are to be made, provide proposed progress payment plan.
- Provide a copy of Proposer's License or Support Agreements with Proposal.

Tab 6: System Requirements

- Define technology requirements required to support each module. Is this cloud based?
- Describe minimum networking requirements for each module.
- If not proposing a cloud-based solution, how many servers will be required to operate the proposed system?

If not proposing a cloud-based solution, provide server hardware requirements and specifications to include at a minimum, system information/operating system, processors/speed, memory, storage, network adapters, etc.

- Provide minimum specifications for user workstations.
- What are the licensing requirements?
- What are the processes for developing interfaces to other systems?

Tab 7: Transition Plan/Training/Support Services

- Proposer shall submit a plan addressing the transition from the current systems to the Bidder's proposed solution without interruption.
- Describe approach for data migration.
- Describe Proposers testing methodology.
- **Clearly define approach for developing and delivering training, including:**
    - On-site training services by a qualified trainer(s) for System Administrators and the Tax Billing & Collection, Land Records, CAMA, and Field management solution users.
    - Written training manuals for each area of software.
    - Costs associated with training shall be included and listed as a separate item on the Cost Proposal Form.
    - Web-based training
- Describe approach for providing support services including the process for submitting inquires, issues, requests and escalating issues that cannot be resolved.
- Describe expectations of County resources needed for project management and training.

Tab 8: Attachments

- Attachment A – Specifications - System Requirement Checklist
- Attachment B – Proposal Form and Offer Certification
- Attachment C – Reference Disclosure Form
- Attachment D – Exceptions to the Request for Proposals
- Attachment E – Intent to Propose
- Attachment F – Catawba County Data Security Addendum

SECTION 3 – PROPOSAL EVALUATION AND AWARD

3.1 PROPOSAL EVALUATION PROCESS

The County shall evaluate all Proposer responses to confirm they meet the specifications and requirements of the RFP. The evaluation of proposals will be based on:

a) Completeness and quality of proposal;
b) Proposers understanding of the range of services requested;
c) Proposers ability to provide a solution that conforms to the specifications included in the RFP;
d) Experience of the Proposer;
e) Training, maintenance and system support offered;
f) Documented verification of desired features and functionality;
f) Cost competitiveness;
g) Past performance and demonstrated success with similar solutions for public entities;
h) Any exceptions to the specifications and/or requirements in this RFP.

Upon completion of the evaluation process, the County will make award(s) based on the proposal(s) that best meet the criteria as set out in this RFP. Award of a Contract to one Proposer does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was deemed most advantageous and represented the best value to the County. Proposers must be registered with the North Carolina Secretary of State, in good standing, and authorized to do business in the State of North Carolina.

If necessary, after the evaluation process, the County reserves the right to shortlist Proposer(s) and request that the Proposer(s) conduct a presentation and be interviewed by the selection committee.

Proposers are cautioned that this is a request for proposals, not an offer or request to contract, and the County reserves the unqualified right to reject any and all offers at any time if such rejection is deemed to be in the best interest of the County.

3.2 METHOD OF AWARD

In accordance with N.C.G.S. § 143-129.8, "Contracts shall be awarded to the person or entity that submits the best overall proposal as determined by the County". In addition, the County may negotiate with any Proposer in order to obtain a final contract that best meets the needs of County. However, negotiations will not alter the original intent of the scope of services.

SECTION 4 – REQUIREMENTS

4.1 PROPOSER RESPONSIBILITY

The Proposer is responsible for verifying any and all information provided and to familiarize themselves with the work required prior to bidding. A plea of ignorance of the conditions that exist, or may hereafter exist, or difficulties that may be encountered in the execution of the work, as a result of failure to make necessary investigations and examinations, will not be accepted as an excuse for any failure, or omission on the part of the successful documents and to complete the work for the consideration set forth herein, or as a basis for any claim whatsoever.

4.2 COMPLIANCE WITH LAWS

All Proposers are expected to comply with all federal, state and local laws and regulations relative to the preparation and submission of proposals for insurance. All proposals that are submitted will be presumed to be in compliance with all applicable laws.

4.3 CONTROLLING LAW

Any contract resulting from this RFP will be governed and construed in accordance with the laws of the State of North Carolina. Venue for any adversarial proceeding is Catawba County.

4.4 INDEMNIFICATION

Any work to be performed by Proposer as a result of this RFP shall be performed entirely at Proposer's own risk. Proposer shall indemnify and save harmless the County, its commissioners, employees, agents and representatives from any and all liabilities and claims of every kind, including attorney's fees, to which County may be subjected on account of loss, destruction or damage to property or injury to or death of persons, including Proposer and persons employed by Proposer, arising out of or in connection with performance of the contract. The provisions of this paragraph shall not be applicable to loss or damage caused by the negligent act of omission of County or its employees.

4.5 TERMINATION

At a minimum, County may terminate the Agreement for the Proposer's uncured material breach by providing written notice. The Proposer shall have thirty (30) days from receipt to cure such breach to the reasonable satisfaction of the County.

4.6 PROPOSER'S LICENSE OR SUPPORT AGREEMENTS

The Proposer must include in its Proposal, its license and/or support agreements for review and evaluation. Terms offered for licensing and support of Proposers' proprietary assets will be considered. The terms and conditions of the Proposer's standard services, license, maintenance or other agreement(s) applicable to Services, Software and other Products acquired under this RFP may apply if approved by County and to the extent such terms and conditions are consistent with County's contracting policies and requirements, do not violate any laws, and do not materially change the terms and conditions of this RFP. In the event of any inconstancy, conflict or ambiguity among the terms and conditions of the County's Request for Proposals and the Proposer's response, the terms and conditions of the County's Request for Proposals shall control.

4.7 NON-APPROPRIATION CLAUSE

Payment to Proposer for services is expressly conditioned upon availability of funds, and upon the actual receipt of funds, from appropriated revenue sources. If funds are insufficient to meet expected performances hereunder due to non-appropriation or reduction of funds by the source, services to be provided hereunder may be adjusted by the parties, in writing, to conform with the funds which are actually available. If such adjustment is impractical or would defeat the intent or purpose of this Agreement, same may be terminated accordingly without penalty.

4.8 INSURANCE COVERAGE

If Proposer is selected for contract award, a Certificate of Insurance must be provided showing coverages, with limits approved by County, for the following lines: commercial general liability, automobile liability, workers' compensation & employers' liability and cyber liability.

4.9 WARRANTIES

Catawba County will assume that any software company submitting a proposal in response to the RFP, warrants and guarantees that the products or services designed to be supplied by the company are, in fact, fully capable of performing the tasks designated by the RFP. The contract entered into between the County and the company will contain the warranty that any products supplied will be new and free from defects in design, materials and workmanship, and will be capable of the purpose for which the RFP was designed and published. No limitation or exception to this warranty provision will be acceptable to Catawba County. If the products or services are not capable of performing the task designated by the RFP, Proposer will assume the liability of providing services and programming at no extra cost to deliver the product promised in the Contract signed by the Software company.

4.10 SUBCONTRACTORS

The successful Proposer will be the primary software company and will perform the services using their own workforce. The Proposer shall not subcontract the project without the prior approval of the County. If the Proposer intends to subcontract any part of the Project, the subcontracted services and subcontractor information must be clearly identified in the submittal, including roles, resumes of key personnel and project references.

4.11 E-VERIFY

Proposer shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes. Further, if Proposer uses a subcontractor, Proposer shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes.

4.12 AUTHORIZED SIGNATURE

All proposals must be signed by persons who have the legal authority to bind the provider to the contract that is proposed.

ATTACHMENTS BEGIN ON NEXT PAGE

ATTACHMENT A
SPECIFICATIONS
SYSTEM REQUIREMENT CHECKLIST (TAB 6)

Part 1 - All Respondents must complete and include Attachment A with submittal.

		Yes/No	Comments
Item #	**Specifications / Requirements**		
1	Must be a system that uses a minimum windows server version of 2019 (Version 2022 preferred)		
2	The solution must integrate fully with the County's current financial accounting software which is Oracle PeopleSoft for all posting.		
3	The system must reside on a SQL Server Database version of 2019 or higher (Version 2022 preferred).		
4	If a cloud based system, the new system must be linked to the County Offices by a real time/live connection. Must include a robust API.		
5	Software must be within the latest two versions of compliant tested release.		
6	The system should allow both real time processing and batch processing.		
7	The system should allow effective dating of transactions.		
8	The system shall be an on-line, interactive, menu driven, solution that is user-friendly and reasonably easy to learn utilizing Microsoft technology.		
9	Menus have drill-down capabilities for detailed inquiry.		
10	The system must be able to add data elements during installation and with minimum modifications once installation is complete. (NCGS § 132-6.1. Electronic data-processing and computer databases as public records.)		
Multiple Years			
11a	The system must be able to maintain 10 years plus current information per parcel record and have the ability to bring over all current software's data during conversion.		
11b	Parcels should not be deleted, but the statuses should be changed to reflect that records are inactive and popup stating the status.		

		Yes/No	Comments
Audit/Change Tracking Capabilities			
12a	The system must record user logins and logouts for transaction logging. Moreover, the system must track the identification of the person to enter or last update any information, record or data element in the system for "audit trail" purposes.		
Security/Permissions			
13a	The system shall produce an audit report listing: date, time, parcel number, user name, command, field name, original data, and changed data. This should be provided through ad hoc report or robust quarry builder. The report must be able to be run based on a date range or parcel number.		
13b	Highly customizable security to include definable security levels which limit access as well as read write privileges on a per field, per tab/screen, per module, and/or per role.		
13c	The system must provide file maintenance activity audit trails.		
13d	Capability to reset passwords for a user by System Admin.		
13e	Provide a solution for multi-factor authentication.		
Application User Interface			
14a	The System must provide a user friendly graphic user interface (GUI).		
14b	The interface must comply with industry standard design and implementation best practices when developing for a Microsoft desktop OS.		
14c	The system should have the ability to open up new screens into a separate window. This is convenient for those users with dual monitors that want to view two sets of data at one time.		
14d	The application must have an Internet Web browser-based interface for access to parcel information, including document images.		
14e	It must be designed with intuitive interfaces that lead the user systematically through each process.		
14f	The data entry process must be customizable to facilitate rapid data entry. Data fields for a single process should be kept on a single screen whenever possible.		

		Yes/No	Comments
14g	Desired functionality will include the ability to tab between boxes, auto-populate and auto-complete features, field validation (i.e., require four-digit dates), copy and paste fields and records, clear difference between user editable and non-editable fields, and efficient menu items (i.e., checklists, multiple selection menus, radio buttons, browse and attach buttons, drop- down menus, pop-up navigation menus).		
14h	The current parcel should stay active as the user moves between screens or forms.		
15	Users of the system must be able to easily update cost tables, depreciation factors, market adjustments, and any other user-entered variables used by the system to calculate property values.		
16	Must allow for import/export data (including historical assessment data) and reports to commonly used desktop application software. Reports should be able to download to csv, xls doc vs common note pad or pdf.		
17	The system must provide a building sketch function, such as APEX or SKETCHTEK that will calculate areas and perimeters and automatically store the results in predefined fields in the property record for the purposes of calculating value.		
18	Must support and integrate with Enterprise ESRI ARC GIS software.		
19	Ability to associate OCR scanned documents or other electronic images/documents including property photos with the data collected by the system.		
20	Allows internal imaging capability inherent to the system, allowing digital images and scanned documents to be attached to the parcels.		
21	The system shall have a separate sales file capable of maintaining inventories of sold properties at the time of sale with a document reference that may be different from the current valuation inventory.		
22	Enables the ability to copy record characteristics from one to another or to a group of records.		
23	Enables query functions or "drill down" capabilities at the field level to support robust but user friendly reporting and analysis at the desktop.		
24	Supports notes or memos to be entered. Both public and private.		

		Yes/No	Comments
25	The system **must** provide a vendor designed and County approved electronic property record card for all types of properties, with labeled sketch, assessment data and must be able to be accessed either direct or by export from database (API or direct url link).		
26	Allow for Customer (taxpayer) inquiry capabilities on all existing data fields, parcel and account numbers, parcel street name, property address number, owner name, etc.		
27	The system **must** provide a remote field data collection solution for Tax Assessment, allowing the ability to download and upload file information for field inspections utilizing route numbers. The solution should be able to function with or without internet connectivity. System must be able to make changes to the data in the field and then update when return to the office. Future goal will be to do live updates in the field including valuation. System must also have connectivity with permit application smartgov.		
28	Must also be able to accommodate user defined cost tables by year/version. The cost tables shall allow for calibration by the user and support interpolation between areas in the cost tables.		
29	Major valuation methods available with the system must include the table-driven cost approach, comparable sales analysis and income approach.		
30	The system shall have the capability of computing standard assessment statistical analysis such as mean, median, sales ratios, coefficient of dispersion, price related differential, and other tests of the level and equality of assessments. The ability to download this data into standard statistical packages or spreadsheets, such as Excel, is required.		
31	Allow for Customer query capabilities on all existing data fields, parcel and account numbers, parcel street name, property address number, owner name, etc. with unlimited criteria.		
32	The system shall include robust report writing capabilities that allow the user to analyze data and obtain user-defined printouts.		
33	Proposed software must currently be in use in counties in the State of North Carolina and meet all requirements as laid out in the NCGS at no additional fee.		
34	The system must integrate with the County’s financial accounting software (PeopleSoft) and other applications. These include: Laserfiche, ESRI, LOGAN, Credit card payment processing, TRUIST, Pictometry, (mort escrow) Spacialest, etc.		
35	Software vendor must provide updates to programs reflecting any legislative changes enacted by the State of North Carolina at no additional cost.		

CAMA Functionality			
Comprehensive Sales Ratio Studies			
		Yes/No	**Comments**
1	Must have the ability to value by different land segment types and store total acres, total value, total deferred value, market value for each land segment. Land should have neighborhood adjustment factor for Commercial and residential land separated from building adjustments.		
2	Must have user –defined influence factors such as topography, size, soil, utility, road access, etc. and be able to apply to each land segment.		
3	Market Analysis through Multiple Regression Analysis		
4	Assessment Administration		
5	Parcel transfer and conveyances: have the ability to upload customized FTP report from the ROD and Clerk of Court and then upload into a specific workflow.		
6	Appeal Processing and Scheduling		
7	Manufactured Homes		
8	Full Imaging Capability		
9	PDF Creation of a computer generated notices		
10	Proposed software must be able to run in a multi-user, multi-tasking environment with multiple users updating the same file.		
11	Support online mass assessment, to assess multiple properties by several group types including: Subdivision, Neighborhood, Location, Structure type/class, Property type, and User defined group.		
12	Support standard approaches for property valuation:		
12a	Cost approach		
12b	Income approach		
12c	Market analysis approach		
12d	Income approach (for commercial properties only		
12e	MRA (multiple regression analysis).		
13	Unlimited field size to describe property dimensions.		
14	Allow appraisers to manipulate and override cost data and factors, including depreciation factors, class, class adjustment, and land values, to reflect local market conditions.		

		Yes/No	Comments
15	Store and display an assessment method code, from a table, to indicate how the property was valued for all property types.		
16	Interface with a cost system with depreciation tables. Allow cost tables to be calibrated by appraisers and support interpolation between areas in cost tables.		
17	Provide flexibility for appraisers to specify unique or tabled features to property when standard cost approach yields unsatisfactory results.		
18	Flag properties for review where major departures from cost table standards have occurred.		
19	Store sales information including tracking of remarks and listing the individual who provided the information.		
20	Support modeling functions based on the income approach & market approach for assessment.		
21	Table driven size adjustment for acreage pricing.		
Parcel Maintenance Program			
1	Supports multiple street addresses assigned to one parcel (e.g. ownership of condo/apartment complex).		
Parcel Code Tables			
1	Store unlimited number of tabled parcel code types and maintain text description for each code.		
Parcel Record Maintenance			
1	Maintains parcel sale history including:		
1a	Previous owner history.		
1b	Deed of trust amount.		
1c	Instrument of sale (table driven).		
1d	Type of financing: Sale Date, Sale Amount.		
1e	Unlimited number of transactions.		
2	Ability to transfer structure or structures from one parcel to another including the sketch information.		
3	Supports parcel splits or subdivisions or combinations (merges).		

		Yes/No	Comments
4	Support parcel parent/child history by showing where and when the inactive parcel went to or came from when either merged or split. Ability to retain the parent parcel. It also needs to show if a parcel was created or if it became inactive and had no child.		
5	Record and track all changes to map reference numbers.		
6	Prompts user to edit tax exemption codes when property changes ownership.		
7	The system must be able to access historical data including full assessment change history, board of assessment appeals dockets, sales and property characteristic information by year.		
8	Support separate property descriptions for outbuildings and improvements.		
9	Enable the sketching of rounded surfaces and other curved areas, reversal / rotation of a sketch, and irregularly shaped areas.		
10	Attach scanned images of building sketches and photos/files to the parcel record and accessible with API..		
11	Automatically calculate building dimensions and square footage from existing and future sketches and use this calculation to value the improvements within the system.		
12	Record detailed physical characteristics for a building, with the ability to describe each building on a property separately.		
13	Copy sketches from one parcel to another by providing a template for property with similar new construction.		
14	Copy user defined parcel characteristics in batch at year- end, based upon user criteria, to new year parcel records.		
15	Apply adjustments (e.g., corrected assessments) to current year records, prior year records or both, after taxes have been billed.		
16	Apply adjustments in batch mode or on-screen in real time.		
Reports & Querying			
1	Provide ability to view all real property owned by an individual entity, regardless of type, by name or account number.		
2	Produce a comparable sales query and report.		
3	Query comparable neighborhoods and view neighborhood data on screen.		

		Yes/No	Comments
3	Query comparable neighborhoods and view neighborhood data on screen.		
4	Display (e.g., on a single screen) the assessed values for land, improvements, etc. for a parcel across multiple years.		
5	Flag difficult properties for special handling.		
6	Produce reports that will summarize change in assessment, by property, by day, by appraiser.		
7	Query property by any field to check for duplicate records.		
8	Allows inquiry into account information by entering a number or a range of number:		
8a	Parcel number		
8b	Permanent ID/Account #		
8c	Account name/number		
8d	Current Owner		
8e	Property Address		
8f	Multiple parcel types		
8g	Legal description		
8h	Mailing address		
8i	Street address / Unit number		
8j	Map & Parcel		
9	Have the ability to print to:		
9a	Local Printer		
9b	Network printers		
9c	PDF file		
10	System capability to lay out and print forms such as assessing notices, field inspection sheets, sales surveys, labels etc. on blank paper and card stock such capabilities to exist on demand and in batch format.		
11	Maintain verbiage on reports internally.		

		Yes/No	Comments
Year End Processing			
1	Freezes assessment valuations for the year once certified.		
2	Retains assessment certifications by year for each parcel for an indefinite period.		
3	Automatically create new year property records based upon the prior year records.		
4	Automatically create new year reference table records based upon the prior year records.		
User-Interface			
1	Options to interface field data collection equipment (e.g. electronic tablet, laptop) available.		
2	Allow users to use standard MS Windows functions such as the ability to "Copy, Cut and Paste" text from this program to any other Windows based program.		
3	Allow user to correct errors per field, without re-input of entire transaction.		
4	Allow user to override transaction warnings (e.g. invalid parcel number), as long as user has appropriate level of assigned security.		

Part 2 - Proposers are to check one box for each item.
"Other" may include a future release, or meets requirement with the use of a "report writer", modifications, etc.…
If "Other" is selected, please explain by providing details and if associated fees or additional costs will be involved.

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
	CAMA Technical Requirements				
1	Provide for capture of full owner's name(s), full physical address, full legal description, including lot, block, phase, map, section for subdivisions, all taxing jurisdiction codes. Allow at least 40 spaces for Name(s), and Street Address.				
2	Allow for multiple owners with each percent owned, full name of owner, and mailing address of all owners per parcel.				
3	Allow for a taxpayer table, whereby a taxpayer who owns numerous properties may have their name and mailing address in one central location; This should be the account number.				
4	Provide for all taxpayer account types, Exempt, Taxable, Public Utilities, and Business. 1=Taxable, 2=Business, 9=Exempt, 8=Public Utilities.				
5	Provide coding for all property types, Commercial, Industrial, Exempt, Farm, Common Open Areas, Unbuildable and Residential.				
6	Provide coding for property with deferred values, Use Value (Ag.), coding for exemption/ excluded property (age, government, churches, etc.) and Historic Values.				
7	Provide for all tax jurisdiction codes with one levy code, as well as individual municipal districts, fire districts, and townships.				
8	Ability to go from any screen to any other screen without re-entry of the parcel ID.				
9	Comments are accessible from every screen. Screens should have a visual flag to let user know parcel has comments.				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
10	Provide multi-year valuation capability, system should allow for at least 11 years of data (10 years plus current year).				
11	Allow forward and backward browsing				
12	Allow next record & prior record retrieval.				
13	System will include (fully integrated) collection and CAMA module used in calculation and collection of taxes and fees.				
Imaging					
1	Provide flexible sketch package (mouse driven and key entry) for all buildings including outbuildings.				
2	Generate sketch for all classes of buildings.				
3	Edit sketch without having to re-enter all vectoring.				
4	Handle angles in sketch and area calculations.				
5	Handle arcs in sketch and area calculations.				
6	Display partial drawing while vectoring.				
7	Provide edit of sketch for non-closure. (will not automatically force-close unless operator gives system the command to do so).				
8	Identify invalid area description and vector errors (direction and distance).				
9	Ability to sketch by floor, multiple floors.				
10	Allow multiple buildings per parcel.				
11	Allow entry of square footage of main and auxiliary areas in lieu of drawing.				
12	Adjust scale of drawing for best fit.				
13	Record story height for each building section.				
14	Update database directly from sketch with computed size, perimeter and structure data.				
15	Automatically update database when sketch is changed and saved.				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
16	Display sketch label and size for each building section inside the sketch.				
17	Ability to assign different values to segments of a building that have different uses.				
18	Property record card should display total sketch and all vectoring.				
Data Entry					
1	Fields to include:				
1a	Parcel Number (numeric)				
1b	PIN Number is a 16 (but not limited to)-digit number based on a geometric center of the center of a parcel.				
1c	Map Number (numeric and alpha)				
Land Data					
1	Highest & Best Use tied to user defined use code.				
2	Use Code				
3	Zoning				
4	Total Acres				
5	Road Type				
6	Utilities				
7	Influence Adjustments (road frontage, size, shape topo., access, etc. per each land segment).				
8	Land Base Rate				
9	Land valuation should use table driven values by road type and segment type size table. Adjustments per land segment with market adjustment to effect All neighborhood factor s for entire neighborhood.				
10	Unit Type (acre, square foot, unit)				
11	Program adds value to first land segment if acreage priced.				
12	Total Land Units				
13	Total Land Value				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
Building Data					
1	Highest and Best Use tied to user defined.				
2	Improvement Type (convert County's existing tables).				
3	Building Quality / Grade				
4	Actual Year Built (needs to go back to 1800's)				
5	Effective Year Built				
6	Condition code - such as excellent, good, average, poor, very poor - which will each draw from a separate depreciation table.				
7	Story Height				
8	Number of Stories				
9	Building Style				
10	Foundation Type				
11	Number of Rooms				
12	Number of Bedrooms				
13	Number of Full Baths				
14	Number of Half Baths				
15	Additional Bathroom Fixtures				
16	Interior Wall Finish				
17	Floor Covers				
18	Exterior Wall Type				
19	Heat Type / Fuel				
20	Air Conditioning				
21	Fireplace Type / Number of units				
22	Roof material				
23	Roof type				
24	Remodel Year				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
25	Shape Design Adjustment				
26	Physical Depreciation				
27	Functional Obsolescence				
28	Economic Obsolescence				
29	Market Adjustment (neighborhood table to be applied separately to Residential and Commercial buildings).				
30	Property Physical Address				
31	Doing Business As				
32	Date Appraised				
33	Appraised By				
34	Data Entry Date				
35	Entered By				
36	Contact				
37	Revaluation Code				
38	Neighborhood Number				
39	Card Number (1 0f 1, etc.)				
40	Code for Residential or Commercial				
41	Neighborhood Adjustment				
42	Physical Area Adjustment				
43	Code for Extra Feature Items				
44	Length and Width of Extra Feature Items				
45	Number of Units for Extra Feature Items (to be calculated by system using the length and width).				
46	Quality factor for Extra Feature Items				
47	Year built for Extra Feature Items				
48	Condition for Extra Feature Items				
49	% good (to be calculated based on age and condition unless overridden) and % complete for Extra Feature Items.				
50	Auxiliary Area Data (porches, basements, carports, garages, attics, upper stories, etc.)				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
51	Ability to apply a special $ per square foot rate to a building or extra feature item (this rate would not necessarily be in the user defined rates table).				
52	Ability to override depreciation to attain % good or % complete for sketch able building, and extra features.				
53	Ability to display 3 or more sales, with deed-book reference, date, validity codes, sale amount (system should maintain infinite number).				
54	Ability to display 3 or more permit numbers, date, type, status, cost of building (system should maintain infinite number)				
55	Ability to transfer buildings between parcels, and between cards of same parcel				
56	Provide one property record card to accommodate either residential buildings, extra features, and land or commercial buildings, extra features, and land.				
57	Enter and store unlimited notes / comments on individual properties.				
58	Flag / identify new construction (identify by a code UC, or Open, etc.)				
59	Ability to identify property by PIN number				
60	System should not allow entry of incorrect data, i.e., invalid codes or codes / values that do not exist in user defined tables.				
61	Can merge one or more parcels to create a new parcel, *retaining parent parcel* for the general parcel data.				
62	Income: Ability to value property by the income approach, to include:				
62a	Building Type				
62b	Quality of Construction				
62c	Age and Condition				
62d	Apartment / Condo style and bedroom count				
62e	Gross Leasable Area Square footage				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
62f	Net Leasable Area Square Footage				
62g	Number of Units				
62h	Economic Rent per Square Foot or Unit				
62i	Vacancy and Credit Loss				
62j	Other Income				
62k	Effective Gross Income				
62l	Operating Expenses				
62m	Net Operating Income				
62n	Overall Capitalization Rate				
62o	Property Value per Income Approach				
62p	Less Deferred Maintenance				
62q	Plus Excess Land				
62r	Total Property Value				
Present Use Value (Ag)					
1	Ability to appraise property at its Present Use (Ag.) in accordance with NCGS.				
2	System must maintain Market Value and Present Use Value (Ag.) on applicable parcels. This Present use Value must show on the property card.				
3	System must calculate Deferred Value amount between Use Value (Ag.) and Market Value annually.				
4	Ability to create abstract reports on parcels subject to Present Use Value (Ag.).				
5	Ability to code all parcels in the PUV program, and also code the use (Agriculture, Horticulture, Woodland)				
Exemptions					
1	System must be able to calculate value on all parcels that are Tax Exempt/ Excluded per NCGS.				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
2	Ability to code all parcels with Exemptions/Exclusions.				
3	Ability to apply appropriate exclusion amounts.				
4	Ability to generate letters and reports on all parcels with Exemptions/Exclusions.				
5	Ability to create abstract reports on parcels subject to Exemptions/Exclusions.				
6	Ability to Flag parcel/Alert user if value is changed on a parcel with exemption/exclusion.				
7	deferments, and ability to process partial exemptions and deferments.				
Historic Properties					
1	System must be able to calculate value on all parcels that are deemed to be Historic per NCGS.				
2	System must calculate Deferred Value amount between Historic Value and Market Value annually.				
3	Ability to abstract reports on parcels subject to historic exemptions.				
Sales Database					
1	Allow unlimited capture of sales per parcel.				
2	Provide Sales Analysis and statistical module.				
3	*Allow Sales Reporting By:*				
3a	Sales Date				
3b	Vacant vs. Improved				
3c	Commercial vs. Residential				
3d	Land size				
3e	Land Use				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
3f	Zoning				
3g	Neighborhood				
3h	Range of Parcels				
3i	Township				
3j	Building Type				
3k	Actual Year Built				
3l	Effective Year Built				
4	Provide Comparable Sales Report with a minimum of 3 comparable sales.				
5	Allow interactive sales ratio analysis.				
6	Utilize user defined comp. selection criteria to search for comparable sales in computation of market values.				
7	Allow flagging of invalid sales for inclusion or exclusion in sales studies.				
8	Include reference to supporting property characteristic file.				
9	Permit on-line modeling and what-if analysis without risk of corruption to database.				
Reports / Statistical Analysis					
1	Sales ratio report (appraisal value/sale price) to include standard CAMA appraisal statistics including Mean, Median, COD, Standard Deviation, Coefficient of Variation (COV), Price Related Differential (PRD), Weighted Mean.				
2	Sales Ratio report can be run using any of the following criteria: vacant, improved, residential, commercial; valid or invalid sale, or both together.				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
3	Land Analysis Reporting using all possible data in CAMA database relative to land (including parcels which have since been improved).				
4	Building Analysis Reporting using all possible data in CAMA database relative to buildings.				
5	Parcel Inventory Analysis using all possible data in CAMA database.				
6	Value Analysis Reporting using all possible data in CAMA database relative to value analysis of land, building and total.				
7	Property Record Card printing on demand either individual parcels or batch printing.				
8	Real estate abstracts on demand and by either individual parcel or batch, including blank abstracts.				
9	Provides option to automatically list real property on abstract with real estate information as needed such as property description and acreage.				
10	Allows ad hoc reporting using third party products.				
11	Produces unlisted real property report.				
Appraisal Functions					
1	Provide test environment so that we can test "what if" scenario.				
2	Ability to value real property by three approaches to value: Cost, Market, and Income.				
3	Ability to allow adjustments to value by % to land and or improvement: Individually, not in mass or to total value.				
4	Replacement Cost New Building Value				
5	Replacement Cost New Less Depreciation Building Value				
6	Replacement Cost New Less Depreciation for Outbuildings / Extra Features				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
7	Base Land Value				
8	Total Adjusted Land Value				
9	Present Use Land Value				
10	Total Land Value				
11	Acre / Square Foot / Unit (lot), land pricing that can be implemented across specified parameters, i.e.., neighborhood, parcel range, land use, zoning, etc., up to and including the entire master file simultaneously.				
12	Ability to mass update land, building, extra features by parcel range, neighborhood, or subdivision.				
13	Store value history (unlimited) with reasons for change.				
14	Interpolation between rates in cost tables due to size factor and/or perimeter.				
15	Store multiple records per parcel.				
16	Value property by Income Approach using Direct Capitalization.				
17	Develop and apply tables of market rents, cap rates, vacancy levels, expense ratios on both the jurisdictional and neighborhood level.				
18	Track building permits, their type, and their status.				
19	On-line valuation summary ledger, giving instant access to current state of valuation base, including breakdowns by property class.				
20	Designate property use type by floor and value each floor based on its usage (i.e., multi storied commercial buildings).				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
21	Ability to trace parcel lineage (parent, child, split, combination) on-line.				
22	Provide that table changes automatically recalculate all associated property records under user control with error reporting.				
23	Ability to display and print cost tables and depreciation tables as reference material at any time.				
24	Allows user to round to the nearest 100 at the Market Value Summary for Total Improvement Value (depreciated building plus extra features) and the Total Land Value.				
25	Allow testing for insignificant changes to not update parcel values based on user defined tolerance levels.				
26	Provide field for "percentage of completion" for partially finished structures so market value may be automatically adjusted.				
27	Provide a means of distinguishing new construction value from reappraisal value.				
28	Allow appraisal data to be viewed and processed by parcel range, neighborhood, township, area and subdivision.				
29	Contain user defined cost tables.				
30	Contain user defined depreciation tables.				
31	Contain user defined building structural elements.				
32	Contain user defined building auxiliary areas.				
33	Contain user defined building height and perimeter adjustments.				
34	Contain user defined Outbuilding/Extra Feature nomenclature, cost and depreciation schedules (based on building type with 60yr to 10 yr. life).				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
35	Contain user defined land adjustment tables, i.e., size, access. **Each land segment must be able to be adjusted for each specification (size, shape, topo, view, etc.)**				
Public Access					
1	Vendor will provide a webpage of Catawba County's Appraisal and Assessment data (including sketches and photos) accessible to the public.				
Appeals					
1	Enter / track appeals information on-line.				
2	Generate mailings and labels for appeal notices and findings to taxpayers				
3	Produce reports summarizing all appeal activity.				
4	Support and track details per parcel for all levels of appeal: Office Review, Field Review, Board of Equalization and Review, Property Tax Commission, and Courts of Appeal.				
Change of Value Notice					
1	Ability to print Change of Value Notices on demand by appraiser, date or reason code.				
2	Produce report summarizing all Change of Value Notices.				
3	Ability to use more than one "Change of Value".				
Historic					
1	Ability to view CAMA system as it existed at the time of each value posting - including sketch.				
GIS					
1	Interactive map user control displays ArcGIS Online or ArcGIS Enterprise web maps services. Must have the ability to authenticate secured services.				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
2	Web map's layers include feature services that display live data from the proposed system's database.				
3	Map layer symbology can be configured in the ArcGIS Online or ArcGIS Enterprise Map Viewer and stored in the web map definition.				
4	Map control renders selections from query results. Also provides interactive tools selecting parcels spatially.				
5	Clicking on a parcel produces a Pop-up which is configured in the ArcGIS Online or ArcGIS Enterprise Map Viewer and stored in the web map definition.				
6	Interactive map displaying Comparable Sales ranked parcels.				
7	Interactive map displaying Ratio Studies results.				
8	Interactive map for batch editing neighborhood codes.				
9	Interactive map for dispatching workers for field data collection and have ability to search by custom address locator or feature layers.				
Mobile Field Units					
1	Mobile application (Windows, iOS).				
2	User interface designed for touch screen. Supports touch gestures, stylus, or mouse.				
3	Interactive map displays.				
4	Web map layers support offline geodatabase syncing as well as ESRI mobile map packages. Must include ability to download cache imagery for disconnected viewing.				
5	Supports working hosted feature layers when internet is available.				
6	Supports working offline with checked-out datasets. No loss in data collection or editing functionality.				
7	Edits made while disconnected can be checked back in to hosted feature layers.				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
8	All parcel structure, attachment, and outbuilding data is loaded for editing, including adding new or removing existing.				
9	Property photos are loaded to the tablet. Using the device camera, new property photos may be taken and associated with the parcel. Ability for building or parcel tagging for photo.				
10	Sketch images can be loaded to the tablet.				
11	Multi-page property record card images can be loaded to the tablet.				
12	All images can be marked up using virtual ink, simulating writing on paper.				
13	Support for onboard, USB, or Bluetooth GPS device.				
14	Shows locations of tablet on the map.				
15	All edits including image markups, and new photos are automatically pulled into production database. No duel entry is required.				
16	Ability to display and review parcels in a routing number order.				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
Personal Property Technical Requirements					
1	Each screen in taxpayer maintenance should have a heading that reflects the taxpayer parcel number, taxpayer name and Situs Address. This is a control feature to ensure that the user is working with the correct account.				
2	Ability to assign new personal property parcel numbers and allowing maintenance to be completed in same step.				
3	Taxpayer name(s) with adequate characters, system will allow multiple owners per account. If adjustments are needed this will be completed at no additional cost to the County.				
4	Address 40 (but not limited to) characters at least 3 lines + City/State/Zip.				
5	Field to identify Business or Personal (i.e. 'B' or 'P').				
6	Lookup feature on maintained fields.				
7	Field for city or township code (i.e. Hickory, Newton, etc.)				
8	Field for business category code: i.e.: 1 (retail), 2 (wholesale), 3 (manufacturing), 4 (service), 5 (leasing/rental), 6 (farm), 7 (other) Note: Need lookup option to identify available codes above.				
9	Field for business filing status code: 1 (corporation), 2 (proprietorship), 3 (partnership), 4 (other) Note: need lookup option to identify.				
10	Allows accounts to be flagged active or inactive.				
11	Two (2) fields for Social security/Fed. I.D. with protection against public access or masked.				
12	Two (2) fields for Contact persons.				
13	Two (2) fields for phone numbers.				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
14	Two (2) fields for employer name.				
15	Two (2) fields for employer address.				
16	Two (2) fields for employer phone numbers.				
17	1-character field for audit flag i.e. 'A'				
18	3-character field for auditor initials				
19	Field for date last audited.				
20	Field for date business established.				
21	Field for date of last filing.				
22	Field for date out of business.				
23	Fields for month and day of business fiscal year end.				
24	Field to automatically indicate person who last maintained info. Note: Not to include person who viewed only.				
25	Provide a comment screen with unlimited lines to maintain comments over the life of the account. Accounts should have a visual flag to let user know there are comments.				
26	Field for user defined exemption codes (at least 3 characters).				
27	Field for 6-character SIC (standard industrial classification) code. Note: When enter SIC code the system should automatically display business type and have look up option to look SIC which should be listed in alpha order. Also need the ability to add and delete to this file.				
28	Large field for business activity description.				
29	Field for Real Estate owner parcel number.				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
30	Field(s) for Real Estate owner's name.				
31	Field(s) for physical address (situs) of personal property.				
32	8-character field for extension date.				
Asset Maintenance					
1	Each screen should reflect Tax Year, Taxpayer Parcel Number, Taxpayer name and Situs Address.				
2	System should flag late listed accounts, by use of dates or codes.				
3	Ability to maintain 11 years personal property listing records and view history in the same format as current year.				
4	User defined exemption code can be applied at the asset level (not whole account).				
5	Ability to data entry: several types of assets: (1) Depreciable' s, (2) Non-Depreciable' s and (3) Others such as airplanes, boats and motors, private vehicles, etc. Data entry fields should correspond to the abstract formats from both the individual and business forms. The reduction of keystrokes and the ease at which data is entered from the listing abstracts should be an important feature in order to reduce man-hours as much as possible. The detail of the data entry of these assets are as follows: see below:				
6	Field to display depreciable asset group code descriptions as follows and to add additional group codes as deemed necessary :				
6a	ME machinery & equipment				
6b	FF furniture & fixtures				
6c	CE computer equipment				
6d	EI expensed items				

Item #	Requirement	Yes - Meets Requirement	Yes - w/Additional Fee	No - Not Available	Other - Please Explain
6e	LH leasehold improvements				
6f	OT other				
7	Ability to enter depreciable asset data (additions, deletions, changes) from the abstract into a format which includes fields for displaying years of acquisition, (note: prior year asset cost by years of acquisition should be prelisted and displayed in an original cost field on the data entry screen), field for additions by year of acquisition, field for deletions by year of acquisition. The data entry format should also include fields for calculating totals for control purposes. (Note: This data entry field should resemble the format for depreciable assets on the business abstract listing form).				
8	Ability to change depreciation/trending schedule code to current year assets being entered for a specific account.				
9	Field for Depreciation Factors displayed by year (up to 25 years) for each group code (ME, FF, CE, EI, LH, OT)				
10	Field for prelisted cost for each Year of Acquisition for 25 years for depreciable group codes. Acquisition costs prior to 25 years should be rolled into "PRIOR: field.				
11	Ability to enter depreciation/trending tables as provided by the North Carolina Department of Revenue.				
12	Ability to over-ride depreciated values (i.e. pollution control equipment exempted and over-ride value as zero)				
13	Fields to display non-depreciable asset group code descriptions as follows:				
13a	CIP construction in progress				
13b	SUP supplies				
14	Fields to display costs for non-depreciable (CIP and SUP).				
15	Listing date should be displayed on personal property asset screen.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
16	Late listing flag should be displayed on personal property asset screen, if applicable.				
17	For asset type OT (Other), BM (Boat & Motor), AI (Airplane), MH (Mobile home), PV (Personal vehicle) need the following info: description, purchase year, purchase price, tax year, account # (account name should be displayed when acct. # entered)				
18	Other 'OT' need lines for the following: description, purchase year, purchase price, tax year, account # (account name should be displayed when acct. # entered.)				
19	Boat and Motor 'BM' need lines for the following: tax year, registration # of watercraft (6characters), taxpayer acct # (account name should be displayed when acct # entered), appraised value, purchase price, purchase year, boat description (including make and model, year), length, motor description (including make, model, year), horsepower, tax district code.				
20	Airplanes 'AI' need lines for the following: tax year, account # (acct name should be displayed when acct. # entered), airplane serial # (12 characters), appraised value, purchase price, purchase year, make, model, airplane year, tax district code.				
21	Personal Vehicle 'PV' need lines for the following: tax year, VIN, taxpayer acct. # (account name should be displayed when acct. # entered), appraised value, make, model, year of make, body, condition, tag number, title number, tax district code.				
22	Mobile Home 'MH' need lines for the following: tax year, acct. # (acct. name should be displayed when acct. # entered), VIN, appraised value, purchase price, purchase year, manufacturer, MH Year, width, length, MH Park number, lot number, title number, title number, tax district code.				
23	Ability to extract owner and asset information on campers, boats or mobiles homes to create park surveys. Need the following fields: Asset field with Park Parcel (real estate parcel) displaying park name associated on the real estate parcel and situs fields.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
24	Ability to Mass File Date abstracts and BPP Extensions or a similar system to file date a large quantity of abstracts at once.				
25	Field for Total Value for each account for the total of all assets listed should be displayed on a summary screen.				
26	Asset transfer (ability to transfer assets intact from one account to another).				
27	Ability to prelist assets for a taxpayer for the next tax year. For example if we determine that certain assets were acquired by an existing taxpayer after billing, but before the next listing period, we would like to be able to prelist these assets for the next tax year without losing the current tax year data as billed and without affecting current year history.				
28	Ability to maintain accounts with zero tax values, without creating zero (0) tax bills. We want this account to receive a tax listing form for the following tax year.				
29	Interface with motor vehicle program to compare VIN listed on personal property and VIN listed in motor vehicle program and flag matches.				
30	Interface with Vessel Valuation program to compare hull ID listed on personal property and listed in vessel valuation program.				
Queries					
1	Ability to search for accounts by taxpayer (or partial taxpayer name), DBA names (or partial DBA names), Formerly Known As names (or partial Formerly Known As names), business owner name (or partial business owner name), address (mailing or physical), phone number (any in maintenance), Social Security Numbers, Federal ID number.				
2	Ability to access other programs i.e. STARS (software program of the North Carolina Department of Motor Vehicles) and NCTVS website for motor vehicles.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
3	Ability to access Collection files by taxpayer account number, parcel number, taxpayer name, business name. This should be 'View Only' for current and 11 previous years. Ability to search for (but not change or modify) the following:				
3a	Payment history to include amount paid				
3b	Date paid				
3c	Outstanding tax amounts and for which tax				
3d	Years those amounts apply				
3e	Tax rates displayed for year of inquiry				
4	General query ability to capture specified data and create specialized reports.				
5	Search by key words in tax payer's name.				
6	Search and query by SIC code.				
7	Query for specified variances in values between tax year by taxpayer.				
8	Query for specified value ranges.				
9	Query for taxpayers with fiscal ending dates other than 12/31.				
10	List taxpayers without certain information in specified fields.				
11	List accounts with audit flags.				
12	List of accounts with a 'date of last audit'				
13	List of accounts with no additions or deletion over the last specified number of years.				
Reports and Other Requirements					
1	Ability to carry data forward to the next tax year without losing any data. Mass rollover of assets and taxpayer maintenance from the current year to the next year.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
Reports and Other Requirements					
2	Ability to design templates for printing individual and business personal property abstracts and listing.				
3	Previous year assets should be prelisted by cost and year of acquisition on current listing forms (abstracts).				
4	Ability to print individual and business personal property abstracts and instructions.				
5	Ability to print blank abstracts.				
6	Ability to create monthly tax form for short term rental vehicle gross receipts tax.				
7	Provide ability to print previous years individual and business personal property abstracts on demand or batch including blank.				
8	Apply barcode to each abstract (individual and business). Will require equipment to read barcode and stamp "received" and/or "postmarked" date on each abstract.				
9	Ability to set up new individual and business personal property accounts with a description for each category of personal property (i.e. Business or Personal).				
10	Ability to print extension request letter response.				
11	Ability to create list of extensions granted or rejected.				
12	Ability to flag each account that is granted an extension of time to list with date to which listing period is extended.				
13	Print rejection letter for abstracts that are returned to taxpayer for being unsigned, filled out incorrectly or incompletely, etc.				
14	Flag accounts that receive rejection letters with date abstract was received and returned to taxpayer.				
15	Ability to print non-listers reports for individual and business personal property.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
16	Ability to print non-lister letters for individual and business personal with detail of non-listed personal property and value of each category of property and a grand total of all non-listed personal property.				
17	Maintain infinite year's tax history and have ability to view all history.				
18	Ability to upload tapes from vendor that provides vehicle and single wide mobile home values.				
19	When unregistered motor vehicles or single wide mobile homes are entered into system, system will automatically price vehicles and mobile homes.				
20	Ability to upload electronic data in the future for other taxable personal property such as airplanes and boats, etc.				
21	Ability to pull records as specified in a query and print reports, letters, etc. (i.e. top ten taxpayers, all businesses of a certain type, all taxable assets of a certain type, etc.).				
Billing Collections Technical Requirements					
1	General: Interfaces with:				
1a	Tax collections				
1b	ESRI ArcGIS Enterprise geographic information system GIS.				
2	Appraisal - Real estate & personal property				
3	General Ledger				
4	Lockbox: (Remit Plus) No processing of payments on a $0 balance.				
5	Auto Agent Web Application				
6	Five Star Consulting NC Debt Setoff Program.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
7	Starz through NCVTS: Note: Starz is the motor vehicle program through NC DMV. VTS is the program that the NC Dept of Revenue uses. It is accessed by a host on demand web-based 3270 terminal emulator. The county does not wish to integrate with this program but will need to access it.				
8	Skip trace database i.e.: Accurint				
9	Wire transfers from banking institution				
10	Tax payment website i.e.: (ACI, Inc., PayPal) Do not want software to allow payment from two parties.				
11	Billing information				
12	Late listing fees				
13	Interest charges				
14	Refunds				
15	NSF charges				
16	Collections				
17	Pre-pays				
18	Releases				
19	Supplemental/ Discovery				
20	Municipality charges				
21	Misc. Fees				
22	Taxpayer name(s), up to 40 spaces per line for names.				
23	Separate Line for Name 1 and Name 2.				
24	Phone number (Limited viewing using security).				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
25	Mailing Address (3 lines + city/state/zip) Up to 40 (but not limited to) spaces per line for street addresses.				
26	Location/ Situs address.				
27	Social Security number (1 per name) (Limited viewing using security).				
28	Ability to link SSN to employer id in employment information database.				
29	Ability to link SSN to bank routing id in banking information database.				
30	Date of birth (Limited viewing using security).				
31	Abstract number				
32	Parcel Number / Account Number				
33	Ability to have multiple owners per parcel.				
34	Provides one place of taxpayer account maintenance across all systems (Ability to "tie" separate real estate parcels and personal property accounts to one owner) for billing and collection purposes.				
35	Supports fire fees though billing and collection process. Ability to calculate fire fees based on the state legislation and adopted by the County.				
36	Provide miscellaneous receipts collection procedures for user defined functions such as privilege licenses, EMS collections, etc.				
Billing					
1	Automatically generates late listing and other penalties.				
2	Ability to process discovery / immaterial irregularity bills for the current year and the 10 previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have the ability to print worksheets with multiple copies and the discovery bill. System should flag a designated space in the taxpayer maintenance file that a discovery has been processed. Ability for user to view all discovery data.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
3	Discovery bill data should include: month and year of discovery, approval date, parcel/account number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for discovery, fire fee or fire tax amount, compute late listing penalty through designated year, late listing penalty, senior citizen exemption amount.				
4	Ability to process supplemental bills for current year and the five previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have ability to print worksheets with multiple copies and the supplemental bill. System should flag a designated space in the taxpayer maintenance file that a supplement has been processed. Ability for user to view all supplemental data.				
5	Supplemental bill data should include: month and year of supplement, approval date, parcel/account number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for supplement, fire fee or fire tax amount, compute late listing penalty through designated year, late listing penalty, senior citizen exemption amount.				
6	Ability to process deferred bills for the current year and prior years as desired by user. System should calculate all taxes, penalties and interest for applicable years. System should have the ability to print worksheets with multiple copies and deferred bills. System should flag a designated space in the taxpayer maintenance file that a deferred tax bill has been processed. Ability for user to view all deferred billing data.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
7	Deferred bill data should include: month and year of deferred bill, approval date, parcel number, taxpayer's name(s) with multiple lines, taxpayer's address with up to 3 lines plus city/state/zip code, township code, municipal code, school code, fire code, special tax district code, description or reason for deferred billing, fire fee or fire tax amount, compute penalties and add interest by designated date.				
8	Ability to process releases to real and personal property accounts for the current year and the 10 previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have ability to print release worksheets with multiple copies and the corrected tax bill. System should flag a designated place in the taxpayer maintenance file that a release has been processed.				
9	Ability for users to view all release information.				
10	Release data should include: month and year of release, approval date, parcel/account number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for release, fire fee or fire tax amount, compute last listing penalty through designated year, last listing penalty, senior citizen exemption amount.				
11	Ability to process refunds for the current year and the five previous years. System should calculate all taxes, penalties and fire fees for applicable years. System should have the ability to print refund worksheets with multiple copies and corrected tax bill if necessary. System should flag a designed place in the taxpayer maintenance file that a refund has been processed. Ability for user to view all refund information.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
12	Refund data should include: month and year of refund, approval date, account number, parcel number, taxpayer name (2 lines), taxpayer address (3 lines + city/state/zip code), township code, municipal code, school code, fire code, special tax district code, description or reason for refund, fire fee or fire tax amount, compute late listing penalty through designed year, late listing penalty, senior citizen exemption amount.				
13	System should have ability to balance and report all changes generated by discoveries, supplements, releases and refunds.				
14	Ability to generate and print monthly summary reports of discoveries, supplements, deferred billing, releases and refunds. These reports should indicate year of discovery, supplement, deferred billing, release or refund; amount of each tax and fire fee and late listing penalty; amount of value (personal and real value should be defined separately); totals by tax year; totals by levy year; and grand total for month.				
15	Ability to generate and print year-to-date summary reports of discoveries, supplements, releases and refunds. These reports should indicate year of discovery, supplement, deferred billing, release or refund; amount of each tax and fire fee and late listing penalty; amount of value (personal and real value should be defined separately); totals by year; totals for each month; grand total for year.				
16	All tax bill calculations and printing must be protected with user security.				
17	Tax Bill number, Account number				
18	Fiscal year Information				
19	Date due & Delinquent After Date				
20	Taxpayers names and address				
21	Township				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
22	Parcel identification number				
23	Deed book reference				
24	Description of property & Location/Situs				
25	Number of acres				
26	Number of lots				
27	All Taxing Districts including fire tax districts,				
28	fire fee districts, school district, etc.				
29	Personal property valuation				
30	Real property valuation				
31	Exemption amount				
32	Total value of Farm Machinery & Equipment				
33	Use value totals				
34	Market value totals				
35	Deferred value totals				
36	Total valuation (Building and Real Property separated)				
37	County tax rate				
38	Fire tax rate				
39	Municipal rate				
40	County tax				
41	Fire tax				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
42	Landfill Fee				
43	Any other Special Fees				
44	Municipal tax				
45	Special tax districts				
46	Special assessment				
47	Late listing penalty				
48	Value Subject to Late Listing Penalty				
49	Delinquent taxes				
50	Interest on delinquent taxes				
51	Total tax due				
52	Amount Due if Paid by Date				
53	Bar code of account number and bill amount				
54	Message field (user-defined)				
55	Ability to view tax bills and all billing information on screen.				
56	Ability to produce bills for one account type only or selection of account types.				
57	Ability to enter tax value furnished by the North Carolina Department of Revenue to the correct account (this is a total amount and is not broken down as to asset type).				
58	Ability to produce bills for Public Utilities from the State Tax Certification form AV-31 and include tax amounts due to collection totals.				
59	Handles billing for multiple owners with percentage interest in parcel.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
60	Bills customized to County’s format, may additionally be required to meet needs of other jurisdictions.				
61	Automatically calculates interest charges and makes interest adjustments for approved releases on delinquent taxes.				
62	Ability to make multiple releases per tax bill.				
63	Provides ability to enter effective date for interest charges on delinquent taxes.				
64	User-defined penalty schedule				
65	Automatically prints all back taxes due on tax bill.				
66	Provides tax levy and valuation information for fiscal year-NC form TR-1 ## (##=fiscal year number) by providing breakdown of values for personal, residential, commercial, industrial & Public Utility property as well as present use value, historic and inside roadway corridors. Not to exclude breakdowns for municipal districts, motor vehicles and various other requirements made by the State.				
67	Upon entry of a change in property which is no longer eligible for farm deferment, system automatically calculates deferred taxes and provides option of printing tax bill.				
68	Provides user-defined number of years to be used in the back tax calculation for use value/deferment including interest and due date. To produce in written from for estimation and/or collection.				
69	Ability to distribute special assessments collected to various municipalities and other taxing district.				
70	Ability to provide register but no bill for negative bill amounts zero tax bill amounts.				
71	Ability to generate and print property tax bills as well as supplements, discoveries and farm deferment bills on demand in individual or batch mode.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
72	Ability to assign release numbers by user.				
73	Ability to charge tax bills to multiple owners of a single property according to percentage ownership.				
74	System capable of supporting outsourcing of printing.				
75	System does not create bills which are less than a user-defined amount (e.g. $3.00) This can be defined for individual tax districts.				
76	System capable of creating a delinquent tax notification by parcel number .				
77	System is capable of selecting the criteria for the bill print file that is sent to the printer for the mass mailing of the bills i.e.: do not include any with address of 5 West Main St.				
78	All reporting capabilities must account for security at user's level.				
79	Create and manage Beer & Wine Privilege Licenses; print licenses and application forms; define and manage fees associated with each type.				
Collection Appraisal Reports					
1	Reports to pull valuation totals on all districts and all types of real estate and personal property for estimated tax base and/or tax certification.				
2	Tax Rates & Special Fees for all Tax Districts, including fire.				
3	Tax Scrolls for Real Estate Property Parcels.				
4	Tax Scrolls for Personal Property accounts.				
5	Tax Scrolls for Combined Real Estate & Personal property.				
6	Pre-bill reports i.e.: No fire code, Less than 100% ownership, Owned by multiple accounts, Parcels not on abstract, acreage reconciliation report, exempt accounts with abstract, etc.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
7	Real Estate valuation totals breakdown by property type and tax districts.				
8	Personal Property valuation totals breakdown by Individual, Business and/or combined, property types and tax district with individual tax district breakdowns and summary totals.				
9	Bills – Ability to print on demand, including municipal bills, supplements, discoveries, deferments.				
10	Exclusion Scrolls – Alpha and/or Numeric				
11	Exemption Scrolls – Alpha and/or Numeric				
12	Use Value Scroll – Alpha and/or Numeric				
13	Historic Scroll – Alpha and/or Numeric				
14	Business Personal Property Scroll - Alpha				
15	Individual Personal Property Scroll - Alpha				
16	Mortgage Scroll – Alpha and/or by Mortgage Co., Bill Number, and Amount Due				
17	Fire Fees by Fire District				
18	Use Value Letters report				
19	Exemption Detail with Taxes Loss Report				
20	Top Ten Taxpayers, Separate by real estate, personal or combination of both				
21	Historic properties report				
22	Any report required by the State of North Carolina, (TR1, AV8, AV50, etc.)				
Collection and Billing Inquiry					
1	Tax collections will have security based on user.				
2	Accounts for the collection of real and personal property taxes.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
3	Subject to the Machinery Act of North Carolina and NCGS Chapter 105.				
4	Ability to access system on any pc by use of authorized login credentials. Each clerk must be able to post payments at any pc in the office by the use of an authorized login.				
5	Ability to display all billing information for an individual taxpayer with a single inquiry.				
6	Ability to provide up-to-date tax table information.				
7	During on-line inquiry of taxpayer's account, status of releases and refunds is displayed.				
8	Ability to display tax levy and valuation information.				
9	Provides for inquiry into tax bill information by VIN#				
10	Provides for inquiry into tax bill information by Tag#				
11	Provides for inquiry into tax bill information by Driver's license #'s				
12	Provides for inquiry into tax bill information by Employer ID				
13	Provides for inquiry into tax bill information by Bank				
14	Provides for inquiry into tax bill information by Social Security #'s				
15	Provides for inquiry into tax bill information by Addresses: mailing and location.				
16	Provides for inquiry into tax bill information by Township/Map/Parcel.				
17	Provides for inquiry into tax bill information by Taxpayer name.				
18	Provides for inquiry into tax bill information by Parcel Identification number.				
19	Ability to enter unlimited notes for individual taxpayer accounts.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
20	Provides for inquiry into unlimited payment history (minimum 11 years: 10 years of history and current year) MUST convert 10 years prior history.				
21	Automatic computation of principal and interest for a single account or all accounts.				
22	Provides payment breakdown by various levies, fees, garnishments, penalties, and interest.				
23	Provides for processing of tax releases and ability to change the status of the release.				
24	Ability to print receipts & duplicate receipts (from any PC in office & on demand), whether or not a receipt option was chosen in the beginning.				
25	Supports cash drawer.				
26	Properly allocates partial payments.				
27	Ability to both automatically or manually distribute payment to outstanding bills in user-defined order (i.e. payment would first go to the oldest bill then to County interest, County ad valorem, municipality interest, municipality ad valorem, fire interest, fire ad valorem, and then tag fee).				
28	Ability to transfer payments from one account or bill to another with appropriate audit trails and General Ledger interface.				
29	After release is applied to taxpayer's account, system allows user to immediately print a corrected bill and state "Corrected Bill" on actual bill.				
30	Ability to automatically reflect proper interest.				
31	MUST Provide daily receipts register for balancing by clerk.				
32	Ability to print out statement of all taxes due by a taxpayer name, address or account number on demand.				
33	Ability for Personal property description (such as year, make, size of mobile, boat detail information, etc.) to show in Collections records				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
Payment History Screen Detail					
1	Date/time of transaction				
2	Bill number and receipt number				
3	Total paid				
4	Breakdown of payment (i.e. ad valorem, interest, other fees, etc.				
5	Paid by (option to key in name who paid)				
6	Show refunds on screen				
7	Clerk who posted transaction				
8	Who refund was issued to (ability to key in name)				
9	Release/ void information				
10	Transfer information (if applicable)				
11	Type of payment (check, cash, charge, etc.)				
12	Checking account/ charge account number				
13	Notes				
14	Daily receipts register provides distribution by general ledger account number. General Ledger account numbers assigned to each type and payment code.				
15	Tax				
16	Fire				
17	Late listing				
18	Advertisement fee				
19	Municipal				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
20	Special assessments (i.e. storm water fee)				
21	Tax rate				
22	Breakdown of cash, money orders, checks, etc.				
23	Garnishment fees				
24	Interest on each of the above categories, listed separately.				
25	Provides interface to general ledger for posting of payment activity.				
26	Ability to determine the general ledger accounts and funds to which journal entries are made for tax transactions.				
27	Ability to mark accounts requiring special handling (bankruptcies, garnishments, etc.).				
28	Ability to exempt accounts from interest				
29	Ability to access detailed billing and collections information.				
Collections Inquiry to Appraisal Record History on Parcel					
1	Date disposed and type of disposition (master, split, etc.)				
2	Previous owners and previous owner's account number.				
3	Tax values				
4	Acreage				
5	New owner name and address				
6	Acreage and value for new owner				
7	Ability to create bill for new owner's parcel and includes any delinquent taxes on their parcel of property.				
8	Accepts computer-readable payment data from mortgage companies or payment processing organizations. Must be able to code bills with mortgage company number prior to billing.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
9	Store all billing, payment and adjustments transactions to taxpayers account on line for 10 years (statute of limitations.) Must convert 11 years of PRIOR RECORDS (10 years of history plus current).				
10	Ability to automatically generate delinquency letters, enforced collection letters based on the type of garnishment applied.				
11	Ability to purge old unpaid accounts and insolvent accounts.				
12	Ability to provide duplicate receipts for bills paid in the past.				
13	Show collections by month in: Dollars. Collections on Discoveries should be separate from regular tax.				
14	Shows collections by month or which shows collections by month in: Percent of levy collected.				
15	Shows collections by year as indicated by the Annual Settlement Report.				
16	Show Situs				
17	Provides ability to write off or purge tax accounts deemed uncollectible based upon user-defined criteria such as date, account, etc.				
18	Displays stats for accounts deemed uncollectible.				
19	Ability to accept payment on uncollectible accounts.				
20	Automatic removal of overpayments status message once refund check is issued.				
21	Record tax payments with full audit trail.				
22	Total tax due displayed for visual verification prior to posting of payment amount.				
23	Produce a report of on-line posted payments for settlement prior to General Ledger interface.				
24	Provide an adjustment function where payments may be corrected by a positive or negative amount if posted in error.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
25	Warnings on payment and inquiry screen for specific flags such as garnishment, bankruptcy, foreclosure, etc.				
26	Access to collection/payment screen from inquiry screens.				
27	Ability to reverse a payment from any order. Not having to back off last payments, reverse your payment, and then repost the others back on.				
28	Ability to hide receipts totals from clerks during daily reconciliation process (Blind balancing)				
29	Ability to bar code bills with account number and amount due so cashiers can scan bills in processing payments.				
30	Ability to account for NSF checks and drafts, i.e. reverse transaction.				
31	Ability to track how customer paid (i.e. check, money order, cash, with ability to capture bank account number if paid by check or credit card number if paid by charge card if allowed in future by County) Ability to protect field for bank account numbers and card numbers.				
32	Ability to scan check into system and have image of check attached to payment record (without having to logon to another system).				
33	Ability to batch check images to upload to bank (PNC) without having to scan each individual check again.				
34	Ability to correct transaction errors before posting to general ledger.				
35	Ability to inquire on prior years bills (history).				
36	Ability to do forced collection forms.				
Collection Reports					
1	The following reports can be printed by user entered date range and must be capable of being sorted by situs, date, type of tax and levy year.				
2	Release register In Detail.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
3	Prepayments				
4	Receipts register in detail.				
5	Ability to print the Permanent Tax Scroll. All of the accounts being billed for the current year. This record is kept for 10 years.				
6	Receivables list				
7	Current taxes				
8	Discoveries				
9	Overpayment report (list of accounts)				
10	Refund report				
11	Tax bills by parcel listing				
12	Delinquent taxpayers report in detail.				
13	Accounts underpaid/overpaid by one dollar or less.				
14	Taxpayer’s receipt				
15	Prepayments report				
16	Lists overall percentage of combined tax collected. Percent of each tax charge collected.				
17	Report for outstanding real estate and personal tax as of month end date. Outstanding Discoveries should be totaled and Regular Tax should be totaled.				
18	Totaled—This report is totals (month and year).				
19	Ability to enter refunds. Ability to enter refund checks. Ability to run a report showing all accounts that has been refunded for a particular month.				
20	Ability to create tax garnishments on demand or in batch processing based on employer information connected to taxpayers account and housed in the employer database.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
21	Ability to import refunds Oracle PeopleSoft				
22	Create and manage Beer & Wine Privilege Licenses; print licenses and application forms; define and manage fees associated with each type				
23	Provide miscellaneous receipts collection procedures for user defined functions such as privilege licenses, EMS collections, etc.				
Delinquent Case Collections Processing					
1	Maintain an employer database with current employer id numbers tied to taxpayer SSN.				
2	Ability to add employers to the employer database based on specified id numbers.				
3	Maintain a bank information database based on routing numbers with current routing numbers tied to taxpayer SSN or FID.				
4	Ability to add banks to the database based on federally assigned routing numbers.				
5	Case management system that can hold all of a taxpayer's delinquent tax bills in one case with assigning a unique case number that is printed on all delinquent correspondence.				
6	Ability to create tax garnishments on demand or in batch processing based on employer information connected to taxpayers account and housed in the employer database.				
7	Ability to create bank attachments on demand or in batch processing based on information contained in the bank information database and connected to the taxpayers account.				
8	Ability to print any number of form letters in batch or on demand for delinquent accounts.				
9	Ability to create workflow queues automatically for delinquent accounts based on specified criteria for various collection agent.				
10	Ability to created collection agent codes for each individual delinquent collector.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
11	Ability to run collection reports for any specified time period by collection agent to gauge productivity.				
12	Unlimited space for notes in collection cases.				
13	Ability to create numerous collection statuses to assign to delinquent cases and that status display on customer service inquiry screens.				
14	Ability to block certain collection statuses on account from payments without a supervisor password.				
15	Ability to forecast interest on delinquent letters and print that information on demand.				
16	Ability to stop interest from calculating on certain case statuses.				
17	Ability to "bypass" certain case statuses from other processes.				
18	Ability to created advertising files and adds a fee to each parcel in that file. File should include: Owner property description and amount owed.				
19	Ability to close cases that have a zero balance automatically and remove the status from the taxpayers account but leave the status on the bill history for a record of how it was paid.				
20	Ability to print a release of attachment or garnishment on demand or in a batch process.				
21	Ability to code an account or case related to an account with any collection status deemed necessary.				
22	Ability to create a menu of various collection status codes.				
23	Ability to place a payment plan account in default status or on a default report if they have not paid the amount specified within 30 days of the scheduled date of payment.				
Interaction with Finance Software					
1	Ability to import refunds into Oracle PeopleSoft				
2	Allow for import/export data				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
3	System should have ability to balance and report all changes generated by discoveries, supplements, releases and refunds				
4	Ability to transfer payments from one account or bill to another with appropriate audit trails and General Ledger interface.				
5	Ability to track how customer paid (i.e. check, money order, cash, with ability to capture bank account number if paid by check or credit card number if paid by charge card if allowed in future by County) Ability to protect field for bank account numbers and card numbers				
6	Ability to account for NSF checks and drafts, i.e. reverse transaction.				
7	Provide interface to general ledger for posting of all payment activity, including all refunds and over payments				
8	Create and manage Beer & Wine Privilege Licenses; print licenses and application forms; define and manage fees associated with each type				
9	Ability to scan check into system and have image of check attached to payment record (without having to logon to another system				
10	Work with Debt Setoff in creating Debt Setoff file				
11	Daily receipts register provides distribution by general ledger account number. General Ledger account numbers assigned to each type and payment code.				
12	Breakdown all payments by payment method.ie; Cash, Check, Credit card etc.				
13	Ability to determine general ledger accounts and funds to which journal entries are made for tax transactions.				
Land Records					
1	Land Records will need a Conveyance import process that pulls specific deed types from the Register of Deeds (Logan) nightly. This import will include the following information: deed instrument type, Bk/Pg., sale amount, sale validity code, date of transaction, ROD completion date and LR completion date.				

Item #	Requirement	Yes - Meets Requirement	Yes – w/Additional Fee	No - Not Available	Other - Please Explain
2	Ability to perform split/combine process transactions.				
3	Ability to perform all types of land record transactions/updates.				
4	Ability to create owner codes for new ownership.				
5	Ability to perform all needed duties for Parcel Record Maintenance.				
6	Allow for multiple owners with each percent owned, full name of owner and mailing address of all owners per parcel.				
7	Allow for taxpayer table, whereby a taxpayer who owns numerous properties may have their name and mailing address in one central location.				
8	Reports/Queries: Able to run report for ROD completion date/date completed by LR.				
9	Data Entry-PIN needs to be 16 (but not limited to) digits (need to allow for condos/structure only)				
10	Automated parcel conveyance module that will import specific deed data to update the parcel record information for all straight, combination and split parcel records.				

ATTACHMENT B
PROPOSAL FORM AND OFFER CERTIFICATION

Proposer must fill in the table(s) and provide on a separate sheet a detailed itemization for all costs associated with the items and services proposed pursuant to this RFP.

Include all costs associated with support, maintenance, license fees, service fees, upgrades, data migration, conversion, implementation, verification costs, training, etc. Also include estimates for interdepartmental integration with Finance, Register of Deeds, GIS/Mapping, and Permit if there is an additional cost.

PROPOSAL FORM

Application	Original Development Organization	Date of First Release	Date of Most Recent Release

Item No.	Module	Pricing	Number of user licenses included in Pricing	Price per additional user license
1		$		
2		$		
3		$		
4		$		
5		$		
6		$		
7		$		
8		$		
	Total Price for Module		$	

Optional Services or Functionalities – may or may not be purchased by the County

Item No.	Description	Cost
9		
10		

Check all the following that are included in the quoted Required Modules Price:

- ☐ Complete integration of all modules with no internal interfaces
- ☐ Site license for all desktop modules
- ☐ First year maintenance on software
- ☐ Technical support and customer service
- ☐ End user training at implementation
- ☐ Ongoing end user and administrative training

Maintenance Cost Year 2: $____________________ Year 3: $____________________

Maintenance Cost Year 4: $____________________ Year 4: $____________________

ACKNOWLEDGEMENT: Addendum, if issued, received and used in computing bid:

Addendum No. 1 ______________________ Addendum No. 2 ______________________

Addendum No. 3 ______________________ Addendum No. 4 ______________________

OFFER CERTIFICATION

In compliance with this Request for Proposals (RFP), and subject to all the conditions herein, the undersigned Proposer offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item and contained in this Proposal Form.

By executing this bid, the undersigned Proposer understands that false certification is a Class I felony and certifies that:

- this bid is submitted competitively and without collusion (G.S. 143-54),
- none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the North Carolina General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and
- it is not an ineligible Vendor as set forth in G.S. 143-59.1.
- it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.

By executing this bid, Proposer certifies that it has read and agreed to the terms and conditions included in the RFP. Failure to execute/sign bid prior to submittal shall render bid invalid and bid WILL BE REJECTED.

ACCEPTED AND AGREED TO:

Company Name: ____

Signature: ____

Printed Name: ____

Title: ____________________________ Date: ____________________

BID ACCEPTANCE.
If your bid is accepted, all provisions of this RFP, along with the written results of any negotiations, shall constitute the written agreement between the parties (“Contract”).

ATTACHMENT C
REFERENCE DISCLOSURE FORM

Proposer shall provide information regarding experience in work similar to this scope of work by listing FIVE (5) RECENT CLIENTS, ONLY ONE OF WHICH MAY BE A CATAWBA COUNTY GOVERNMENT LISTING. References should be clients of a similar scale as the services requested in this RFP.

1. COMPANY NAME: ____

   PERSON TO CONTACT: ____

   TELEPHONE NUMBER: ____

   EMAIL ADDRESS: ____

   PROGRAMS/MODULES IN USE: ____________________________________

   YEAR IMPLEMENTED: ____

   SERVICE DATES:
   BEGINNING________________________END________________________

---

2. COMPANY NAME: ____

   PERSON TO CONTACT: ____

   TELEPHONE NUMBER: ____

   EMAIL ADDRESS: ____

   PROGRAMS/MODULES IN USE: ____________________________________

   YEAR IMPLEMENTED: ____

   SERVICE DATES:
   BEGINNING________________________END________________________

---

3. COMPANY NAME: ____

   PERSON TO CONTACT: ____

   TELEPHONE NUMBER: ____

   EMAIL ADDRESS: ____

   PROGRAMS/MODULES IN USE: ____________________________________

   YEAR IMPLEMENTED: ____

   SERVICE DATES:
   BEGINNING________________________END________________________

4. COMPANY NAME: ____

PERSON TO CONTACT: ____

TELEPHONE NUMBER: ____

EMAIL ADDRESS: ____

PROGRAMS/MODULES IN USE: ___________________________________

YEAR IMPLEMENTED: ____

SERVICE DATES:
BEGINNING__________________________END__________________________

---

5. COMPANY NAME: ____

PERSON TO CONTACT: ____

TELEPHONE NUMBER: ____

EMAIL ADDRESS: ____

PROGRAMS/MODULES IN USE: ___________________________________

YEAR IMPLEMENTED: ____

SERVICE DATES:
BEGINNING__________________________END__________________________

ATTACHMENT D
EXCEPTIONS TO THE REQUEST FOR PROPOSALS

If there are any exceptions to the RFP or any deviation from the specifications and/or requirements that are not addressed in the Attachment A: Specifications – System Requirements Checklist, please explain exceptions and/or deviations here and reference with the appropriate page/section number. For any exception and/or deviation to be accepted, it must be approved by the County. However, no implication is made or intended by the County that any exception and/or deviation will be acceptable.

ATTACHMENT E
INTENT TO PROPOSE
RFP NO: 24-1004

This form should be e-mailed to TinaWright@catawbacountync.gov to ensure you receive all addenda issued for this RFP.

I, ____ a representative of ______________________

____ confirm that we intend to submit

a bid for **RFP No: 24-1004 – Governmental Tax Management Software:**

Company Name____

Address____

Contact Name____

Phone (____) ____

E-mail____

Date____

ATTACHMENT F
CATAWBA COUNTY DATA SECURITY AGREEMENT
(The awarded Proposer will be required to sign Catawba County's Data Security Agreement)

Catawba County
Addendum – Data Security
Additional Terms and Conditions

This Data Security Addendum ("Addendum") is made this ___ day of ___________, and supplements Catawba County service contracts and vendor contracts that include access to internal network operation and/or access to confidential information, including but not limited to access to network operations; confidential information protected under the Privacy Act, HIPAA, or other laws or regulations; and confidential information either through data information exchange or through direct data collection from employees.

Data Security

__________________________ ("Service Provider" or "Contractor") agrees to implement administrative, physical, and technical safeguards that are commercially reasonable and appropriate to protect the confidentiality, integrity, and availability of the electronic data that it creates, receives, or transmits on behalf of Catawba County. Commercially reasonable and appropriate safeguards include but are not limited to:

- Secure physical environment,
- Secure network environment,
- Strong password protected environment,
- Up-to-date virus protection and automatic up date of the virus protection and definition files,
- Data encryption on any data stored or transported on mobile devices,
- Compliance with appropriate laws and regulations, i.e. HIPAA, PCI, HITECH and Red Flag Rules, and
- Use US Department of Defense cleaning and sanitizing standard for equipment disposal.

Chain of Trust

Service Provider must ensure that partner agreements are in place where any agent, including a subcontractor to whom it provides Catawba County's data, agrees to implement administrative, physical, and technical safeguards that are commercially reasonable and appropriate to protect Catawba County's data.

Transmission Security

Service Provider agrees that all transmissions or exchanges of system and application data with Catawba County and/or any other parties expressly designated by Catawba County shall take place via a secure means, e.g. HTTPS, SSH file transfer protocol, FTP/SSL, or FTP/TLS.

Data at Termination of Contract

Service Provider agrees to erase, destroy, or render unreadable all devices containing Catawba County's data that are required to be turned into a vendor for replacement, sold, or otherwise disposed of, including any equipment containing a hard drive. Service Provider further agrees that upon termination of this contract, it shall return Catawba County's data in a mutually agreeable format, then erase, destroy, and render unreadable all other data and certify in writing that these actions have been completed within thirty (30) days of the termination of this contract.

Permitted Uses and Disclosures

Service Provider may not use, share, sell, or otherwise dispense of any of Catawba County's data for any purpose other than as covered under the Agreement.

Reporting of Unauthorized Disclosures or Misuse of Data

Service Provider will promptly report to Catawba County any suspected or actual breach of security of which it becomes aware that affects Catawba County's data. Service Provider will also promptly report to Catawba County any use or disclosure of Catawba County's data other than has been allowed in the Agreement and/or Addendum. Service Provider will also promptly report to Catawba County any use or disclosure of Catawba County data other than has been provided in this Contract and/or Addendum. Where a breach or unauthorized release, as defined in NCGS §75-65 or in any other state or federal regulation is attributable to Service Provider, Service Provider shall pay for or promptly reimburse Catawba County for the full cost of remediation and any associated legal fees.

Cyber Liability Insurance Required

Service Provider must carry and maintain, throughout the period of the Agreement, at Service Provider's sole expense, cyber liability and data breach insurance at a level acceptable to Catawba County. A Certificate of Insurance ("COI") shall be furnished by Service Provider to Catawba County at the time of, or before execution of the agreement, and annually thereafter for any extended term. Such COI's shall require the insurer issuing the underlying policy to name Catawba County as an additional insured and provide Catawba County with a minimum of thirty (30) days' notice prior to modification or cancellation of said policy. The maintenance of such insurance will not in any manner affect Service Provider's obligation to indemnify Catawba County. Service Provider agrees that such insurance shall be primary, regardless of any other insurance coverage which Catawba County may procure for its own benefit. Service Provider agrees to indemnify County if the insurance policy referenced in the COI does not contain, at a minimum, the coverage amounts listed on the COI.

Internal Practices

Upon reasonable notice, Service Provider will make its internal practices, policies, procedures, and documentation available during an on-site inspection no more than once per year if so required by Catawba County or at such a time that Catawba County may reasonably determine that the Service Provider has breached the Agreement or this Addendum. Failure by Catawba County to inspect does not relieve Service Provider of its responsibility to comply with this Addendum, nor does Catawba County's failure to require remediation constitute acceptance of such practice or a waiver of Catawba County's enforcement rights under the Agreement or this Addendum.

{Signatures on following page}

IN WITNESS WHEREOF, the parties have executed this Addendum on the day and year above first written.

CATAWBA COUNTY	**SERVICE PROVIDER**
By: ______________________________	By: ______________________________
Name: ____________________________	Name: ____________________________
Title: _____________________________	Title: _____________________________
Date: _____________________________	Date: _____________________________

END OF ATTACHMENTS