



**Agenda Action Form Overview**

The Board is requested to approve the contract for the software replacement of the current AS400 Property Tax Software.

**Background/Justification**

Durham County Tax Administration (DCTA), for more than 20 years, has been using a comprehensive tax software solution based on a AS400 server. The current software lacks operating and technology efficiencies offered through newer tax systems.

DCTA issued a RFP for Property Tax Software with an initial advertisement date of August 31, 2020, last day for questions of September 16, 2020 and a proposal due date of October 1, 2020 by 2:00pm. Six (6) proposals were submitted timely for DCTA consideration. Two proposals emerged as leaders upon review. DCTA leadership staff scheduled a meeting with two NC counties that actively use each of our top two proposals. Subsequently, DCTA staff scheduled a direct meeting with each of the top two vendors for final exploration. As a final step, DCTA staff scored each proposal based strictly on the evaluation criteria listed in the RFP.

Official scoring of each of the six proposals was done by the following staff: Dwane Brinson, Tax Administrator; Teresa Hairston, Deputy Tax Administrator; Starlin Beatty, Deputy Assessor. While three staff members were responsible for the official scoring, a meeting was held with the entire DCTA leadership team (supervisors) for discussion during our scoring of each evaluation metric.

After an objective scoring approach whereby each vendor was scored on the criteria as outlined in the RFP, Farragut scored significantly higher overall than any other proposer. The difference in cumulative points was quite substantial in favor of Farragut. We believe Farragut has the best overall system that will afford DCTA the opportunity to capitalize on efficiencies from the updated technology. Among many other features, the automated workflow procedures are quite impressive. In addition, the estimated cost of the system is similar to other proposals.

Additionally, in 2013 when the State modified how registered motor vehicles were billed and taxes collected, Farragut was the State's (NC Department of Revenue) vendor of choice for the process as well. The NC Association of County Commissioners (NCACC) has served as a partner and avid supporter of Farragut for years. While the Farragut system itself is the most impressive of those included in this evaluation, and in addition to being a clear leader in scoring, it should be emphasized the Farragut is fully minority owned and is based in Durham County. Farragut has been a member of the Durham community, and taxpayer, for many, many years.

It is with a great deal of excitement that we submit a recommendation for DCTA to move forward in pursuing a contract with Farragut.



**Policy Impact**

This facilitation of this service is in accordance with Durham County’s goal to provide a safe and healthy environment to Durham’s residents, patrons, and employees.

**Procurement Background**

**Type of purchase**

- ☐ Goods
- ☒ Services
- ☐ Architect, Engineer or Surveyor Services
- ☐ Construction and Repair

**Did this request for purchase go through a bid process? Yes ☒ No ☐**

*Goods: Bids required if  $\geq$  \$30,000, BOCC approval if  $\geq$  \$90,000*

*Services: Bids required if  $\geq$  \$30,000, BOCC approval if  $>$  \$40,000*

*Construction/Repair work: Bids required if  $\geq$  \$30,000, BOCC approval if  $\geq$  \$500,000*

If yes, attach a copy of bid tab and the minority and women business enterprise (MWBE) compliance review form provided by the Purchasing Division.

If no, why?

- ☐ Sole source exemption
- ☐ Cooperative purchasing program exemption
- ☐ State and federal contract exemption
- ☐ Contract is an amendment to an existing contract
- ☐ Other (please explain)

The initial contract occurred through a competitive process with quotes from three vendors.

**Fiscal Impact**

Funding to support this project will occur through the use of pay as you go funds and the tax reserves fund.

**Recommendation**

Approve contract