

## Request for Legislative Action

Ord. #5696

Sponsor: Theresa Cass Galvin

Date: November 7, 2022

### Completed by County Counselor's Office

Action Requested:	Ordinance	Res.Ord No.:	5696
Sponsor(s):	Theresa Galvin	Legislature Meeting Date:	11/7/2022

### Introduction

**Action Items:** ['Authorize', 'Appropriate', 'Award']

**Project/Title:**

A RESOLUTION authorizing the Director of Finance and Purchasing to award a three-year contract for the furnishing of property tax software for use by the Collection department to Aumentum Technologies of Niagara Falls, NY, under the terms and conditions of Request for Proposals No. 53-22, encumbering \$4,358,245 for fixed fee costs for implementation, training and deployment services and the year 1 annual hosting fee of \$98,345 in fiscal year 2022.

### Request Summary

The Collection department requires replacement of an aging property tax software, acquired in 1998, which is becoming exceedingly difficult to keep operational. The Purchasing Department released Request for Proposal No. 53-22 and received seven proposals. A team of stakeholders have thoroughly reviewed all seven responses and after this thorough review and subsequent scoring, the Department of Collection recommends Jackson County purchase property tax software from our current vendor, Aumentum Technologies.

Aumentum is in the best position to understand our business needs. During the bidding process, Aumentum was best able to come up with Jackson County specific solutions to issues addressed in the RFP process. They understand what we do and what we need, and we will rely on that knowledge heavily during the planning and implementation phases. Proceeding with a vendor who already has a base knowledge will limit the number of additional staff needed to become subject matter experts. Also, as our current vendor, Aumentum has a vested interest in ensuring that we are moved out of their Ascend system and into Aumentum as quickly and successfully as possible. Aumentum is currently the vendor for the Recorder of Deeds Office and has a history of successfully integrating with other solutions, including the current Assessment solution, our newly procured Workday solution, and our current online payment processor. It is a cloud-based solution that can integrate with third-party vendors as needed. Aumentum has experience dealing with our unique Informix database server and has been through a successful conversion from Ascend Informix to the new Aumentum platform.

The overall contract term is three years. The implementation plan includes several months of planning and development and then a 12-month window for implementation. The total payable for FY2022 is \$4,456,590. \$3,771,941 for this project will be appropriated from Fund 013. \$684,649 is already currently budgeted in 013-1305-56661-999-9999-9999-22.

### Contact Information

<b>Department:</b>	Collections	<b>Submitted Date:</b>	10/25/2022
<b>Name:</b>	Karey A. Schulze	<b>Email:</b>	KSchulze@jacksongov.org

## Request for Legislative Action

<b>Title:</b>	Office Admin	<b>Phone:</b>	816-881-3038
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<b>Budget Information</b>			
Amount authorized by this legislation this fiscal year:			\$4,456,590
Amount previously authorized this fiscal year:			\$ 0
Total amount authorized after this legislative action:			\$4,456,590
Is it transferring fund?			Yes
<b>Transferring Fund From:</b>			
Fund:	Department:	Line Item Account:	Amount:
013 (County Improvement Fund)	9999 (*)	32810 (Undesignated Fund Balance)	\$3,771,941
<b>Transferring Fund To:</b>			
Fund:	Department:	Line Item Account:	Amount:
013 (County Improvement Fund)	1305 (Information Technology)	56661 (Software Purchases)	\$3,771,941

<b>Prior Legislation</b>	
<b>Prior Ordinances</b>	
Ordinance:	Ordinance date:
<b>Prior Resolution</b>	
Resolution:	Resolution date:

<b>Purchasing</b>	
Does this RLA include the purchase or lease of supplies, materials, equipment or services?	Yes
Chapter 10 Justification:	Formal Bid
Core 4 Tax Clearance Completed:	Not Applicable
Certificate of Foreign Corporation Received:	Yes
Have all required attachments been included in this RLA?	Yes

<b>Compliance</b>
<b>Certificate of Compliance</b>
In Compliance
<b>Minority, Women and Veteran Owned Business Program</b>
Goals are waived - insufficient MBE or WBE firms available

## Request for Legislative Action

MBE: .00%
WBE: .00%
VBE: .00%
<b>Prevailing Wage</b>
Not Applicable

<b>Fiscal Information</b>
<ul style="list-style-type: none"><li>Funds sufficient for this appropriation and/or transfer are available from the source indicated on the budget information tab.</li></ul>

## Request for Legislative Action

Submitted by Collections requestor: Karey A. Schulze on 10/25/2022. Comments:

Returned for more information by Department Approver Whitney S. Miller on 10/25/2022 2:23:01 PM.  
Comments: Correction to Title.

Submitted by Requestor Karey A. Schulze on 10/25/2022 2:30:23 PM. Comments: corrected subject hosting fee

Approved by Department Approver Whitney S. Miller on 10/25/2022 2:35:13 PM. Comments:

Approved by Purchasing Office Approver Barbara J. Casamento on 10/26/2022 10:28:06 AM. Comments:

Approved by Compliance Office Approver Jaime Guillen on 10/26/2022 12:22:07 PM. Comments:

Returned for more information by Budget Office Approver Mark Lang on 10/26/2022 2:02:08 PM.  
Comments: On the "Budget Info" tab, under "transfer funding from", please populate "013" for the fund.

Submitted by Requestor Karey A. Schulze on 10/26/2022 4:05:28 PM. Comments: corrected transfer fund to 013

Approved by Department Approver Karey A. Schulze on 10/27/2022 10:33:25 AM. Comments:

Approved by Purchasing Office Approver Barbara J. Casamento on 10/27/2022 12:20:42 PM. Comments:

Approved by Compliance Office Approver Katie M. Bartle on 10/27/2022 12:40:23 PM. Comments:

Approved by Budget Office Approver David B. Moyer on 10/27/2022 2:35:46 PM. Comments: Fiscal note is attached

Approved by Executive Office Approver Sylvya Stevenson on 10/27/2022 3:16:16 PM. Comments:

Approved by Counselor's Office Approver Elizabeth Freeland on 11/3/2022 10:40:40 AM. Comments:





## **WHITNEY S. MILLER**

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### **DIRECTOR OF COLLECTIONS**

415 East 12<sup>th</sup> Street, Suite 100  
Kansas City, Missouri 64106  
(816) 881-3187  
Fax: (816) 881-3200  
[www.jacksongov.org](http://www.jacksongov.org)

TO: Barbara Casamento, Purchasing Administrator

FROM: Whitney S. Miller  
Director of Collection

DATE: October 24, 2022

RE: Recommendation for Purchase of Tax Software

In the Spring of 2022, Jackson County went out to bid for a Property Tax Software Application for the Department of Collection and received seven proposals. A team of stakeholders have thoroughly reviewed all responses to RFP 53-22 related to the purchase of property tax software. Represented on this team were associates from Collection, Assessment, IT, Finance, and the Auditor's Office. As part of the review we analyzed proposals, watched demonstrations, called references, initiated a number of follow-up questions and conversations, and reviewed and compared pricing. After this thorough review and subsequent scoring, the Department of Collection recommends Jackson County purchase software from our current vendor, Aumentum Technologies. A summary of the criteria considered and rational for the decision is below.

### **Why Now?**

Property tax software is a tool that allows the Department of Collection to calculate, collect, and distribute property taxes for Jackson County and the taxing jurisdictions. It also offers an outward-facing website for taxpayers to access their own tax records. Our current software was innovative and robust for its time but has been in place since implementation began in 1998. Our current software can only run on 32bit operating systems, which limits the Department in what vendors we can work with and what functions we can perform. Simply put, a 64-bit processor is more capable than a 32-bit processor because it can handle more data at once. A 64-bit processor can store more computational values, including memory addresses, which means it can access over 4 billion times the physical memory of a 32-bit processor. It is becoming exceedingly difficult to keep the software operational.

As a result, we have had to approach the legislature on several occasions seeking appropriations for one-time fixes for problems and have relied on sole source contracts due to how few vendors could integrate with our software.

### **Why Aumentum?**

First, Aumentum is the vendor for our current software, putting them in the best position to understand our business needs. During the bidding process, Aumentum was best able to come up with Jackson County



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specific solutions to issues addressed in the RFP process. They understand what we do and what we need and we will rely on that knowledge heavily during the planning and implementation phases. In speaking

with references for all potential vendors it became clear that we have significantly fewer staff, referred to as subject matter experts, than any of the references we spoke to. These subject matter experts are necessary to help guide a vendor as to our business needs and are required to provide testing of potential solutions.

Proceeding with a vendor who already has a base knowledge will limit the number of additional staff needed to become subject matter experts. Also, as our current vendor, Aumentum has a vested interest in ensuring that we are moved out of their Ascend system and into Aumentum as quickly and successfully as possible.

Secondly, Aumentum is currently the vendor for the Recorder of Deeds Office and has a history of successfully integrating with other solutions, including the current Assessment solution, our newly procured Workday solution, and our current online payment processor. It is a cloud-based solution that can integrate with third-party vendors as needed. Aumentum has experience dealing with our unique Informix database server and has been through a successful conversion from Ascend Informix to the new Aumentum platform.

Finally, Aumentum will not only continue to provide our current functionalities in a modern environment, but it also includes new, innovative components that do not exist in our current system. For example, the proposal includes portals for Delinquent Tax Collection and General Revenue Processing, two functions that Collections currently must maintain outside of our software. Aumentum also has the capability to collect and manage payments made towards a future bill, allowing taxpayers to pay in advance should we choose to move forward with that practice. Aumentum would allow us the option to offer combined billing statements or e-billing. The implementation of this software will allow Jackson County to offer the taxpayers more modern and secure solutions to address both current and future needs.

### **Contract Terms**

Collections is replacing a software that was put into place in 1998 and it is our hope that an upgraded software will sustain our department well into the future. The overall contract term is three years. The implementation plan includes several months of planning and development and then a 12-month window for implementation.



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### **Breakdown of costs over the life of the contract –**

One-Time Base Cost: \$1,818,645

One-Time Implementation and Training: \$2,539,600

Annual Maintenance: \$611,965 w/5% per year increase. Annual maintenance includes \$98,345 for hosting and \$513,620 for support and maintenance for a total of \$611,965. Jackson County will pay hosting fees as soon as the environments are staged, but the remaining maintenance costs will not be due until we “go-live” with the new software.

All one-time costs and the first year of the “hosting” portion of the Annual Maintenance fee are budgeted and will be encumbered in FY22. The total payable for FY2022 is \$4,456,590. Funds for this project are budgeted in the 013 Fund.

### **Scoring**

The final scoring for each of our top-three respondents is below.

Tyler	75.43
Aumentum	78.43
CSS	74.43

WSM

10/24/2022

**Tax Software RFP 53-22 Averaged Scoring**

x	30 pts max	30 pts max	10 pts max	5 pts max	5 pts max	20 pts max	100%
Vendor	Services & Products	Demo	Experience & Qualification	References	Responsiveness & Accuracy	Pricing	Total Avg of All Scores
Tyler	22.57	22.14	7.29	2.43	4.29	16.71	75.43
Aumentum	25.29	26.29	8.71	3.71	4.43	10.00	78.43
CSS	22.29	22.43	7.14	4.57	4.29	13.71	74.43



# Jackson County, MO

RFP No. 53-22 for Collections Tax Software  
Follow-Up Questions

September 13, 2022



**Aumentum**<sup>TM</sup>  
TECHNOLOGIES

**The Future of Appraisal & Property Tax**

# Jackson County, MO

## REQUEST FOR PROPOSAL NO. 53-22 FOR COLLECTIONS TAX SOFTWARE

September 14, 2022

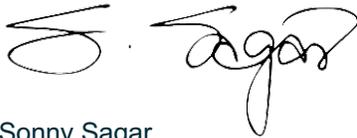
Whitney Miller  
Director of Collections  
Jackson County, Missouri  
415 E. 12<sup>th</sup> Street, Ste. 100  
Kansas City, MO 64106

Dear Ms. Miller,

Thank you very much for the opportunity to follow up with more information after our initial product demonstration and subsequent follow-up materials. We very much appreciate our long-standing partnership with Jackson County and look forward to the opportunity to continue it while migrating your office to the Aumentum Platform.

We hope the following information answers your remaining questions, but if not, please do not hesitate to contact me.

Sincerely,



Sonny Sagar  
Senior Client Executive  
Aumentum Technologies  
785-623-0970  
Sonny.Sagar@augmentumtech.com

### Follow Up Questions

Since we are just upgrading our current software to the new Aumentum platform, we understand there are to be no additional charges for software or license fees for 3 environments of: Tax, Billing, Collection (cashiering), Levy Management, & Public Access.

Since Tax Sale & Business Revenue are 2 new modules we don't already have, we understand there is a one-time charge for license fees of: \$1,818,645. Does that mean then that each module is a one-time license fee of \$909,323 apiece? If not, could you price each module separately?

The pricing shown as "Base Proposal for Software" includes software module license fees, Jackson County-specific product development work, and hosting setup and configuration fees. These fees are broken out as follows:

- Aumentum Business Revenue License - \$201,000
- Aumentum Tax Sale License - \$154,845
- County-specific Product Development - \$1,454,800
- Hosting Setup & Configuration - \$8,000

The Public Access site proposed includes account lookup, live bills & receipts, lender payment import, eBilling, & eForms. If the County would select an online payment processor from Aumentum's integrated vendor list, we understand that there would be no additional charge or fees to accept online payments.

1. Can you provide a list of those integrated vendors? As well as what the transaction fees (if any), & processing fees for each payment type will be charged by each of those vendors if selected?

The list of currently integrated payment processors includes these vendors:

- Heartland
- Bill2Pay
- Point-n-Pay
- FIS
- Payment Express
- Certified Payments
- Paymentus
- Elavon
- JetPay

As for transaction and/or processing fees, those agreements are made between the County and its chosen vendor.

2. Would there be any other additional charges/fees that would be charged or included by Aumentum for the use of the online payment module with one of these integrated vendors?

# Jackson County, MO

## REQUEST FOR PROPOSAL NO. 53-22 FOR COLLECTIONS TAX SOFTWARE

No, there would be no additional costs as our proposal assumes the County selects one of the vendors listed above.

3. **We understand that if the County selects a processor not already integrated with the Aumentum Public Access module, there will be additional charges/fees. Can you please provide all those costs & fees & if they would be 1 time, annual, or transactionally assessed?**

Correct, there would be additional one-time integration fees required to integrate with a new payment processing vendor, however, we cannot provide a quote for these fees until we know which vendor would be handling the County's online payment collection and review their technical documentation. There would not be any additional annual fees to integrate with a new payment processor.

**The annual software maintenance fee was provided as: \$1,929,220 for 3 years, & that the 1st of those would be at: \$611,965. Does that mean that year 2 would be: \$658,628 & year 3 would also be: \$658,628?**

Not exactly, our three-year maintenance fee includes Aumentum software maintenance and Aumentum hosting and managed services. The proposed three-year total fee of \$1,929,220 breaks down as follows:

- Year 1 - \$611,965
- Year 2 - \$642,563
- Year 3 - \$674,691

**If we should choose to alter our "package" (such as not purchasing one of the new modules, or only having two environments instead of three), would that change our annual maintenance amount? If so, what would the adjusted annual amount be?**

Yes, the annual maintenance amount would be reduced if Business Revenue (-\$40,200/year) or Tax Sale (-\$30,969/year) were not purchased. However, the Records, Tax, Levy Management, and Assessment Administration modules are not optional and must be included in the implementation.

If the County decided on two environments instead of three, there would be a reduction in annual fees of \$12,800, however, we do not recommend that our hosted customers have less than three environments so that training, testing, and other maintenance activities have adequate server resources.

## **1.0 INTRODUCTION**

- 1.1** Jackson County, Missouri is seeking proposals from qualified Respondents to provide a turn-key, commercial, off-the-shelf Financial Collection and Distribution Software with an emphasis in property taxes for the Jackson County, Missouri Collections Department.
- 1.2** The proposed software will replace the existing applications used by Jackson County to maintain real property and individual and business personal property taxation records in addition to other non-tax related and non-account specific charges.
- 1.3** The proposed software will provide a robust interface for taxpayers and staff.
- 1.4** The proposed software will allow the County to consolidate, as much as possible, all required functions into a single, state-of-the-art application using current technologies to support the following objectives:
  - 1.4.1** Flexibility to maintain and meet ever-changing business needs and statutory requirements;
  - 1.4.2** Increased operational efficiencies through a well-structured workflow;
  - 1.4.3** Ability to calculate and generate tax bills, tax notices and/or letters, and tax receipts;
  - 1.4.4** Ability to calculate and collect non-tax and non-account specific charges;
  - 1.4.5** Enhanced access to data and increased self-service capabilities for taxpayers;
  - 1.4.6** Increased ability to monitor and manage workload balance;
  - 1.4.7** Ability for a greater level of user-enabled custom reporting and data analytics;
  - 1.4.8** Ongoing support with predictable and manageable annual costs.
- 1.5** This will be a one-time purchase with annual service and/or maintenance agreements
- 1.6** Submission of Bids: Bids must be submitted on-line through the Bonfire Portal at <http://jacksongov.bonfirehub.com> . Bids submitted by any other method will not be accepted.

## **2.0 BACKGROUND**

- 2.1** Jackson County, Missouri is a first-class charter county in the State of Missouri, with a population of 700,307 as of the 2018 estimated census. Geographically it covers 605 square miles on the western edge of the state and is a major component of the Kansas City metropolitan area. There are 18 municipalities in the county with the rest of the county unincorporated, 12 school districts, and other districts for a total of over 100 taxing jurisdictions. The County collects over one billion dollars in property taxes per year to distribute to those jurisdictions.
- 2.2** There are over one million tax accounts in Jackson County, Missouri. There are approximately 300,000 real property parcels in the County, which include the following types (parcel numbers will not add to 300,000 due to mixed use or other combinations):
  - 2.2.1** Residential: approximately 240,000
  - 2.2.2** Agricultural: approximately 7,000
  - 2.2.3** Commercial: approximately 24,000

- 2.2.4 Vacant Land: approximately 42,000
- 2.2.5 Exempt, immune and economic incentive parcels: approximately 28,000
- 2.2.6 PILOT payments:
- 2.2.7 Sewer charges:
- 2.2.8 Railroad and Utility charges:

- 2.3 There are 40,000 active business personal property accounts and 700,000 active individual personal property accounts.
- 2.4 Per the Missouri State Constitution and related statutes, all real property is reassessed every odd year on January 1<sup>st</sup>. The most recent assessment is occurring now, in 2021. Also, by statute, property is taxed annually, based on that valuation and the levy rate to be determined by individual taxing jurisdictions. Tax bills are due annually on December 31<sup>st</sup>.
- 2.5 Currently, Jackson County uses Thomson Reuters Ascend version 3.8 for Real, Personal and Business Property management, including billing and taxation. Assessment is currently transitioning to Tyler Technologies Enterprise, a CAMA system for Real, Personal and Business Property management and valuation. Estimated go live date of May 2022. Jackson County uses PayIt for online payment collection and Jet Pay for point-of-sale credit card payment collection. The County's office productivity software is Microsoft Office 365.
- 2.6 The County is also soliciting proposals from Respondents for the management of our annual Delinquent Land Tax Sale records and collections. The County anticipates the use of the new tax software in 2022 or 2023.
- 2.7 The software and service package proposed by the Successful Respondent shall provide the County a Collection and Assessment solution to replace Ascend. If the Respondent has products or recommendations that improve the system or exceed the following Scope of Services, it is to the benefit of the Respondent to include them in this proposal. The Respondent shall provide a software solution that is fully integrated and user-friendly. The software should be designed so that it can be easily modified by user defined settings which are available in the baseline software; it should also be well documented, at both the user and programmer levels. The software should work in conjunction with various general-purpose software, typically including word processing, spreadsheet, statistical and GIS programs, as it is important that these programs and applications can share data and work together cohesively. Security measures should exist to prevent unauthorized use and to provide backup in the event of accidental loss or destruction of data. The Successful Respondent shall provide software support and technical maintenance on an annual basis. If Respondent offers discount pricing for multiyear, as opposed to annual, support contracts, the County reserves the right to choose between annual or multi-year support agreements.

### 3.0 AWARD REQUIREMENTS

- 3.1 Certificate of Insurance: The Successful Respondent will be required to submit to the Purchasing Department a Certificate of Insurance meeting or exceeding the provisions of Item Fifteen of the General Conditions and Exhibit A included herein within Ten Business Days after receiving the Notification of Award. The Certificate of Insurance must be received by the Purchasing Department prior to the commencement of any work on this project.
- 3.2 Project Exemption Certificate: Jackson County, Missouri is an exempt entity under Section 144.062, Revised Statutes of Missouri. Upon request of the Successful Respondent, Jackson County will issue a project specific Missouri Sales Tax Exemption Certificate to the Successful Respondent and their named subcontractors to be utilized during the performance of this project. This certificate must be requested **prior to the purchase of any materials, supplies and/or equipment**. Under no circumstances will this certificate be back dated to cover materials, supplies or equipment already purchased.
- 3.3 Compliance with Chapter 6: The Jackson County Code for Minority, Women and Veteran Business Utilization will be required on this Request for Proposal. The Contractor's Utilization Plan, Pages 25 through 29 herein, must be completed prior to Award. If Goals are set by Compliance, they are required, not suggested. Failure to comply will result in the REJECTION OF YOUR PROPOSAL.
- 3.4 Licenses and Permits: The Successful Respondent must provide a copy of a current Missouri State Business License to the Purchasing Department within ten business days of Notification of Award. The Successful Respondent must provide, upon written request, evidence of current required Federal, State, Local or Occupational Licenses.
- 3.5 W-9 Form: The Successful Respondent must provide a completed W-9 Form.

### 4.0 SCOPE OF SERVICES

- 4.1 The Successful Property Tax Software Application will meet or exceed the following requirements:
- 4.2 General Capabilities
  - 4.2.1 Software for calculation and collection of ad valorem taxes, special assessments, and any interest, penalties, or fees.
  - 4.2.2 Software must be able to calculate, collect, and/or distribute non-tax payments and non-account specific payments such as payments in lieu of taxes, revenue, and sewer charges. These charges may be annual, monthly, at point of sale, or on an installment basis.
  - 4.2.3 Software must be able to meet all State mandated requirements and Successful Respondent assumes all costs of any modifications to system if legislation change occurs from time of submission of proposal.
  - 4.2.4 Successful Respondent must provide all key personnel necessary for creation, implementation, data migration and training.

- 4.2.4.1** Successful Respondent cannot change key personnel after the submission of their proposal, during the evaluation of and/or award of this proposal. All key changes in personnel must be approved, in writing, to the County.
- 4.2.5** Software must be compatible with Enterprise for real, personal, and business property management and valuation. Software must have an API to retrieve data in real time.
- 4.2.6** Software must have the ability to provide online research options as well as the capability of processing online payments using live real time data, either through their own process or through a third party. Preference will be given to systems that have a robust mobile device capability and multiple browser support.
- 4.2.7** Software must have the ability to create distributions of collected funds to taxing jurisdictions and adjust those funds by applicable commissions.
- 4.2.8** Preference will be given to software that can fully integrate with Enterprise and the County's current GIS (ERSI), Finance (FMS Mitchell Humphrey), Tax Sale (DLT), and/or Recorder of Deeds software (Harris Govern).
- 4.2.9** Current records and historical information must be migrated to the new system from the existing Informix server.
- 4.2.10** Preference given to software that has the capability of managing collection for future billing, and payment in advance options.
- 4.2.11** Preference given to software that offers a Delinquent Land Tax Sale module for tracking and managing delinquent accounts to the point of sale.
- 4.2.12** Preference given to software that offers an option for online and point of sale credit/debit payment collections.
- 4.2.13** Preference given to software that is cloud based and browser independent. It is preferred that the Successful Respondent manage a platform that is independent from other clients.

#### **4.3 Specific Capabilities**

- 4.3.1** Software must be able to maintain historical information per parcel record, per year.
- 4.3.2** Workflow ability such as notification, if there is a value appeal completed and the account needs recalculation.
- 4.3.3** Software shall have e-billing capability.
- 4.3.4** Software shall calculate and collect the County's more complex railroad and utility charges and protested taxes.
- 4.3.5** Software shall track non-tax payments such as revenue, receipt fees, sewer charges, and data request fees.
- 4.3.6** Software shall allow for the use of web-based e-forms.
- 4.3.7** Software shall have built-in self-auditing capabilities such as field entry validation, properly linked table relationships, and business established rules.

#### **4.4 Security and General Administration Capabilities**

- 4.4.1** The Successful Respondent and software will be required to comply with all applicable state and federal laws, rules, regulations, policies, and standards concerning confidentiality and integrity.
- 4.4.2** Software must be secure, meeting current government and industry standards, to prevent unauthorized use and to provide backup in the event of accidental loss or destruction of data.

- 4.4.3 Software must require user login/logout and provide standard and custom definable security levels. The security parameters must include both data access and executable functions.
- 4.4.4 Software must provide an option for an audit trail and track all edits made by users to the database.
- 4.4.5 The Successful Respondent shall provide information on systematic updates to the software before they are implemented. Updates should be specific to Jackson County, Missouri.

#### 4.5 System Administration Capabilities

- 4.5.1 Software must provide for a mass update and/or recalculation function whereby employees only have to enter information once to update the records of various parcels.
- 4.5.2 Software must provide general search capabilities for all information contained within the database. The software shall also allow each user to save search and query formulas and results for future use.
- 4.5.3 Software must be able to import from and export to Microsoft products.
- 4.5.4 Software must have the ability to print and attach barcodes to documents to improve operational accuracy and efficiency of the office.
- 4.5.5 Software must have the ability to add a various number of customizable fields for descriptive and analytical purposes.
- 4.5.6 Software must have the ability to generate customizable reports based on County's specifications.
- 4.5.7 Software must have the ability to have a duplicated test environment.
- 4.5.8 Software must have the ability to provide an interface for the County to test and view software and its functionality.
- 4.5.9 Software shall have the ability to set timed systems process, allowing processes to be planned in advance and set to run automatically at a certain time in the future.

## 5.0 PROPOSAL FORMAT

- 5.1 Submission of Proposals: Proposal must be submitted online through the Bonfire Portal at <http://jacksongov.bonfirehub.com>. Submissions by any other method will not be accepted.
- 5.2 Expenses and cost incurred in the preparation of proposals in response to this Request for Proposal are the sole responsibility of the Respondent and shall not be reimbursed by Jackson County, Missouri.
- 5.6 Confidential and Proprietary Information: Should the Respondent wish to submit confidential or proprietary information, it should be included with the submitted proposal in clearly marked "**Confidential and Proprietary Information**". The County will take all reasonable efforts to ensure the confidentiality of the documents. Please see Section 7.0, Contract Negotiations, Item 7.3 regarding items not considered confidential or exempt from Missouri Law.
- 5.7 To facilitate the evaluation of proposals, proposals and copies shall be organized in the following manner:
  - 5.7.1 Cover Letter to include the following information:
    - 5.7.1.1 Respondent's Name
    - 5.7.1.2 Respondent's Address
    - 5.7.1.3 Respondent's Telephone Number

- 5.7.1.4 Contact Person's Name
- 5.7.1.5 Contact Person's Title
- 5.7.1.6 Contact Person's Email Address
- 5.7.2 All forms contained in the Request for Proposal, filled out signed and notarized where necessary.
- 5.7.3 The remainder of the Request for Proposal package for evaluation purposes.
- 5.7.4 Description of Respondent's background to include the following information:
  - 5.7.4.1 Year of Inception and history
  - 5.7.4.2 Ownership structure
  - 5.7.4.3 Ability to provide products/services required
  - 5.7.4.4 Proof of Financial Capability and Solvency to provide products/services required
- 5.7.5 Respondent's Personnel Qualifications to include the following:
  - 5.7.5.1 Respondent must include the resumes of key personnel that will be working on any resulting contract with the County.
  - 5.7.5.2 Any changes of key personnel after the submission of this proposal, during evaluation or after the award of the contract are subject to written approval by the County.
- 5.7.6 References: Respondent must include a minimum of three references that outline a project similar in scope to this Request for Proposal. The references shall include the following information:
  - 5.7.6.1 Name of business, contact name, telephone number and email address
  - 5.7.6.2 Description and dates of similar project(s) worked on
  - 5.7.6.3 Description of any data conversion services provided
  - 5.7.6.4 Time frame when Products/Services provided
- 5.7.7 Proof of Financial Responsibility
- 5.7.8 Respondent shall provide a written response to each item in Section 4.0 of Scope of Services.
- 5.7.9 Any options offered by the Respondent
- 5.7.10 Proposed Timeline for implementation, training, set-up, and data conversion
- 5.7.11 Warranty for proposed software
- 5.7.12 Pricing Sheet, Required Submission on Bonfire Portal
  - 5.7.12.1 Base proposal for the software
  - 5.7.12.2 Any options offered by the Respondent
  - 5.7.12.3 Implementation and Training
  - 5.7.12.4 Data Migration
  - 5.7.12.5 Software Maintenance and Hosting Fees for three years
- 5.7.13 Contractors Utilization Plan in attachments.
- 5.7.14 Failure to provide this information, organized in this manner, with the appropriate number of copies, may be grounds for the REJECTION of your Proposal, or a reduction of Evaluation Criteria.

## **6.0 EVALUATION CRITERIA AND PROCESS**

- 6.1 All Proposals received that are responsive to the General Conditions, Scope of Services and other attachments and provisions of this Request for Proposal.
- 6.2 Any Evaluation Criteria or weighting of criteria is used by the County as a tool to assist the County in selecting the best proposal for the County. Evaluation scores or ranks alone do not create a right or expectation to a Contract with the County. Ultimately the County may choose to contract with any Respondent regardless of rank or score.

- 6.3 An Evaluation Committee made up of Jackson County personnel will evaluate all responses and make recommendations. Jackson County, Missouri shall be the sole judge of proposals submitted for this Request for Proposal, and its decision shall be final.
- 6.4 The County's Evaluation Committee, will interview and may conduct an interview of Respondents. Any costs associated with interviews will be the Respondent's responsibility and will not be reimbursed by the County.
- 6.5 All proposals received in response to this Request for Proposal become the property of Jackson County, Missouri and will not be returned.
- 6.6 The County's Evaluation Committee will consider various factors when evaluating proposals:
  - 6.6.1 Responsiveness to Request for Proposal 5 Points
  - 6.6.2 Products/Services Proposed 30 Points
  - 6.6.3 Respondent's Experience, Qualifications 10 Points
  - 6.6.4 References 5 Points
  - 6.6.5 Successful demonstration of product 30 Points
  - 6.6.6 Pricing 20 Points

**7.0 PURCHASING INFORMATION, included as a separate attachment:**

- 7.1 Purchasing Information:
  - General Terms and Conditions
  - Certificate of Compliance Notice
  - Insurance Requirements
  - State of Missouri Wage Determination

**8.0 CONTRACT NEGOTIATIONS**

- 8.1 Upon the selection of the successful Proposal, a Contract incorporating the General Conditions, Scope of Services, the Architects Project Manuals and Drawings and other provisions of this Request for Proposal and acceptable to both parties, will be prepared and executed by both parties. Should the parties, within a reasonable time frame, as determined by Jackson County, Missouri fail to develop and execute a mutually agreed upon Contract, and upon a three business day notification to the selected Respondent, the County may reject the proposal and proceed to award the Contract to the next best Respondent.
- 8.2 Pursuant to Section 610.021 RSMo, proposals and related documents shall not be available for public review until a Contract has been awarded or all proposals have been rejected.
- 8.3 In no event will the following be considered confidential or exempt from the Missouri Sunshine Law:
  - 8.3.1 Respondent's entire proposal
  - 8.3.2 Respondent's pricing
  - 8.3.3 Respondent's proposed method of performance, including schedule or timeline and/or deliverables
  - 8.3.4 Respondent's experiences information, including customer lists or references
  - 8.3.5 Respondent's product specifications unless specifications disclose scientific and

technological innovations in which the owner has a proprietary interest. Respondent shall submit a detailed explanation to support any claim of proprietary, scientific or technological innovation in a product specification.

- 8.4 The County generally does not use standard contract forms which may be provided by the Respondent. The Contract used by the County will include both the Request for Proposal and the Respondent's proposal. In the event that conflicts in the language exist between the Request for Proposal and the Respondent's proposal, the provisions of the Request for Proposal shall govern.
- 8.5 The Respondent shall list any and all exceptions as instructed under General Conditions, Item Number Four of this Request for Proposal. Please note that the Respondent's proposal is subject to Rejection if exceptions are taken to the County's General Conditions, Scope of Services and/or forms include in this Request for Proposal.
- 8.6 Respondent must agree to the following standard provisions:
  - 8.6.1 Indemnifications: Respondent agrees, to the fullest extent permitted by law to indemnify and hold the County harmless from damages and losses arising from the negligent acts, errors or omissions of the Respondent in the performance of work under this Contract, to the extent that Respondent is responsible for such damages and losses on a comparative basis of fault and responsibility between Respondent and the County. Respondent is not obligated to indemnify the County for the County's own negligence. Respondent's obligations under this section shall be limited to the coverage and limits of insurance that Respondent is required to procure and maintain under Contract. Insurance shall be procured and maintained by Respondent as described in Exhibit A of this Request for Proposal. Respondent shall file a Certificate of Insurance with the Jackson County, Missouri Purchasing Department in the form described in Exhibit A within the time limit also described in the Exhibit.
  - 8.6.2 Independent Contractor: Respondent acknowledges and agrees that all County information and records are confidential and will not be disclosed or made available to anyone outside the County organization unless authorized to do so by the County to do so in writing.
  - 8.6.3 Complete Agreement: Parties agree that this Contract together with Jackson County, Missouri Request for Proposal No. 40-22 and Respondent's response thereto constitute the complete and exclusive agreement between parties which supersedes all prior understandings or agreements, oral or written, and all other communications between parties relating to the subject matter of this Contract.
  - 8.6.4 Notices: any notice which either party shall be required by the Contract to give the other shall be in writing and delivered by mail addressed to the respective parties as follows, or to such other addresses, as the representative parties may designate from time to time:

County: Jackson County, Missouri  
415 East 12<sup>th</sup> Street, Room 105  
Kansas City, Missouri 64106

Respondent: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**10.0 QUESTIONS**

- 10.1 All questions regarding this Request for Proposal must be submitted via the Bonfire Portal by 5:00 PM, CST on May 20, 2022.
- 10.2 All questions will be in the form of an Addenda on the Bonfire Portal.
- 10.3 Respondent must check for Addenda prior to submitting their proposal.
- 10.4 Respondent’s and their agents (including subcontractors, personnel, consultants or anyone else acting on their behalf) must follow this procedure. Respondent’s or their agents may not contact any other County personnel regarding matters covered by this Request for Proposal during the solicitation and evaluation process. Inappropriate contacts are grounds for the **REJECTION OF Respondent’s proposal.**

**11.0 PRICING SHEET**

- 11.1 The Pricing Sheet is a required submittal on the Bonfire Portal. Base Bid for the 10<sup>th</sup> Floor Courtroom FFE (includes delivery and installation); Single-Prime (All Trades) Contract: The undersigned Respondent hereby agrees to furnish all material, labor, equipment and services, necessary to complete the construction of the 10<sup>th</sup> Floor Courtroom FFE, according to the provisions of this Request for Proposal and all of its attachments.
- 11.2 The County will request that the apparent low bidder submit their schedule of values or costs for any item in the bid and discuss/negotiate a lesser price for the items.
- 11.3 The County reserves the right to adjust the quantities up or down to any and all bid items to accommodate the available funds.
- 11.4 Respondents and their agents (including subcontractors, personnel, consultants or anyone else acting on their behalf) must follow this procedure. Respondents or their agents may not contact any other County personnel regarding matters covered by this Request for Proposal during the solicitation and evaluation process. Inappropriate contacts are grounds for **REJECTION OF RESPONDENT’S PROPOSAL.**

Company Name:	Phone:
Company Address:	Cell Phone:
Point of Contact:	Email:
Title:	
Signature:	