

REQUEST FOR LEGISLATIVE ACTION

Completed by County Counselor's Office:

Resolution No.: 19516

Sponsor(s): Dennis Waits

Date: June 19, 2017

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| SUBJECT | <p>Action Requested <input checked="" type="checkbox"/> Resolution <input type="checkbox"/> Ordinance</p> <p>Project/Title: <u>Authorizing the award of a contract for the furnishing of Consulting and Training Services on the Mobile Assessor Software Program for the Assessment Department to Data Cloud Solutions of Springfield, Ohio as a Sole Source.</u></p> | | | | | | | | | | | | |
| <p>BUDGET INFORMATION <i>To be completed By Requesting Department and Finance</i></p> | <table border="1" data-bbox="324 541 1448 739"> <tr> <td>Amount authorized by this legislation this fiscal year:</td> <td>\$48,420.00</td> </tr> <tr> <td>Amount previously authorized this fiscal year:</td> <td></td> </tr> <tr> <td>Total amount authorized after this legislative action:</td> <td>\$48,420.00</td> </tr> <tr> <td>Amount budgeted for this item * (including transfers):</td> <td>\$48,420.00</td> </tr> <tr> <td>Source of funding (name of fund) and account code number:</td> <td></td> </tr> <tr> <td>045-4500-56662 Assessment Fund, Non-Departmental, Software Maintenance</td> <td>\$48,420.00</td> </tr> </table> <p>* If account includes additional funds for other expenses, total budgeted in the account is: \$</p> <p>OTHER FINANCIAL INFORMATION:</p> <p><input type="checkbox"/> No budget impact (no fiscal note required) <input type="checkbox"/> Term and Supply Contract (funds approved in the annual budget); estimated value and use of contract: Department: Estimated Use: \$</p> <p>Prior Year Budget (if applicable): Prior Year Actual Amount Spent (if applicable):</p> | Amount authorized by this legislation this fiscal year: | \$48,420.00 | Amount previously authorized this fiscal year: | | Total amount authorized after this legislative action: | \$48,420.00 | Amount budgeted for this item * (including transfers): | \$48,420.00 | Source of funding (name of fund) and account code number: | | 045-4500-56662 Assessment Fund, Non-Departmental, Software Maintenance | \$48,420.00 |
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| 045-4500-56662 Assessment Fund, Non-Departmental, Software Maintenance | \$48,420.00 | | | | | | | | | | | | |
| PRIOR LEGISLATION | <p>Prior ordinances and (date): Prior resolutions and (date): 18473, April 7, 2014 and 18934, September 21, 2015</p> | | | | | | | | | | | | |
| CONTACT INFORMATION | <p>RLA drafted by (name, title, & phone): Barbara Casamento, Purchasing Administrator, 881-3253</p> | | | | | | | | | | | | |
| REQUEST SUMMARY | <p>The Assessment Department purchased the Mobile Assessor Software Program from Data Cloud Solutions of Springfield, Ohio as a Sole Source via Resolution No. 18473 dated April 7, 2014. Resolution No. 18934 dated September 21, 2015 was for additional training and consulting services.</p> <p>The Mobile Assessor Software Program has helped the Assessment Department increase efficiency and productivity for field and clerical staff; enabled supervisors to generate a variety of specific reports; improved staff accountability and credibility; supplemented existing procedures; enhanced sales verification procedures and increased the accuracy of assessments. The Assessment Department would like to purchase additional Consulting and Training on the Mobile Assessor Software Program.</p> <p>Pursuant to Section 1030.1 of the Jackson County Code, the Director of Finance and Purchasing recommends the award of a contract for the furnishing of Consulting and Training Services for the Assessment Department to Data Cloud Solutions of Springfield, Ohio as a Sole Source. Data Cloud Solutions is the developer of this software and would be considered a Sole Source for Consulting and Training on this product.</p> | | | | | | | | | | | | |
| CLEARANCE | <p><input type="checkbox"/> Tax Clearance Completed (Purchasing & Department) N/A <input type="checkbox"/> Business License Verified (Purchasing & Department) N/A <input checked="" type="checkbox"/> Chapter 6 Compliance - Affirmative Action/Prevailing Wage (County Auditor's Office)</p> | | | | | | | | | | | | |
| ATTACHMENTS | <p>Memorandum from Jeph BurroughsScanlon, Deputy Director of Assessment and a Quotation from Data Cloud Solutions.</p> | | | | | | | | | | | | |

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| REVIEW | Department Director: <i>Robert D. Murphy</i> | Date: <i>June 12, 2017</i> |
| | Finance (Budget Approval) <i>If applicable</i> <i>[Signature]</i> | Date: <i>6/12/17</i> |
| | Division Manager: <i>[Signature]</i> | Date: <i>6/13/17</i> |
| | County Counselor's Office: | Date: |

Fiscal Information (to be verified by Budget Office in Finance Department)

- This expenditure was included in the annual budget.
- Funds for this were encumbered from the _____ Fund in _____.
- There is a balance otherwise unencumbered to the credit of the appropriation to which the expenditure is chargeable and there is a cash balance otherwise unencumbered in the treasury to the credit of the fund from which payment is to be made each sufficient to provide for the obligation herein authorized.
- Funds sufficient for this expenditure will be/were appropriated by Ordinance # _____
- Funds sufficient for this appropriation are available from the source indicated below.

| Account Number: | Account Title: | Amount Not to Exceed: |
|-----------------|----------------|-----------------------|
| | | |

- This award is made on a need basis and does not obligate Jackson County to pay any specific amount. The availability of funds for specific purchases will, of necessity, be determined as each using agency places its order.
- This legislative action does not impact the County financially and does not require Finance/Budget approval.

**ASSESSMENT DEPARTMENT****JACKSON COUNTY**

JACKSON COUNTY COURTHOUSE
415 EAST 12TH STREET, FIRST FLOOR MEZZANINE
KANSAS CITY, MISSOURI 64106
WWW.JACKSONGOV.ORG

FROM: Jeph BurroughsScanlon, Deputy Director of Assessment
TO: Q. Troy Thomas, Director of Finance and Purchasing
CC: Barbara Casamento
DATE: May 25, 2017
RE: Data Cloud Solutions and Daniel Anderson

The Assessment Department has an ongoing need to obtain consultation/training services related to Mobile Assessor. Mobile Assessor is a product offered by Data Cloud Solutions (DCS), principal Daniel Anderson. The Jackson County Assessment Department has been actively engaged in the use of this product for three years. This product has helped the Assessment Department increase efficiency and productivity for field and clerical staff; enable supervisors to generate a variety of specific reports; improve staff accountability and credibility; supplement existing processes; enhance sales verification procedures and increase the accuracy of assessments.

We are familiar with Daniel Anderson and Data Cloud Solutions. They have been engaged with Jackson County Assessment in this capacity for three years. We are unaware of any other similar company who can offer the same services in an immediate manner as required for the seamless and consistent work of the ongoing reappraisal process. I believe it would be an undue burden on the department to seek out a new consultant and to bring that consultant up to speed in the short period of time needed. For these reasons we believe Daniel Anderson and Data Cloud Solutions to be a sole source vendor for the specific services we need.

In the immediate term (as soon as we are able in 2017) we hope to make a payment to DCS in the amount of \$48,420 for annual maintenance and ongoing training for the products that we have had and continue to use. We expect these funds to come from Assessment non-Departmental funding account 045-4500-5662.

Going forward we want to consider a two year contract with DCS beyond 2017. This will most easily coincide with our state-required biannual reassessment cycle. Additionally, we are interested in adding to our current level of licenses and software from DCS. We expect the cost of these additional products and licenses will not exceed \$112,200. Including this additional software our annual maintenance fees will not exceed \$86,300 annually, starting in 2018.

To summarize, beyond the immediate \$48,420; we would like to take some time to evaluate our options for the additional \$112,200 in licensing and software. If we decide to purchase additional products and services, our maintenance cost may increase; up to \$86,300 annually.



Data Cloud Solutions, LLC
 Mail Payments to: PO BOX 2194
 4 W. Main St - Suite 908
 Springfield, Ohio 45502
 Office Phone: 888-586-6914
 accounting@datacloudsolutions.net

Billing Address

Jackson County, MO
 Jackson County Courthouse, Assessment
 Department
 415 E. 12th St., 1M
 Kansas City, MO 64106

Invoice

Invoice Number: I170120248
Invoice Date: 01/20/2017
Payment Terms: Payment 15 days
 after invoice date
Invoice Amount: 48,420.00

Shipping Address

Jackson County, MO
 Jackson County Courthouse,
 Assessment Department
 415 E. 12th St., 1M
 Kansas City, MO 64106

| Item # | Item Name | Quantity | Unit Price | Total |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|------------|-----------|
| Host-2 | TA: Hosting-Full Client hosting: per parcel, annually: per parcel, annually - SaaS Maintenance, Photo Repository, Field Audit History & Remote Support (2+ year term); SSL, and Guaranteed no-loss data backups & secure storage. (up to 320,000 parcels) | 320,000.00 | 0.06 | 19,200.00 |
| Mnt-CAL1 | TA: CAL Maintenance-1 CAL Maintenance w/ MA-L1 (<25) - w/ 10 free admin console licenses | 14.00 | 500.00 | 7,000.00 |
| Mnt-SiteWG-1 | WG: Site Maintenance-1 Site Maintenance w/ MA-WG-L1 (<25) - (0.30 * 320,000 parcels * 25% should have been the site license/CAMAcloud maintenance, but is virtually waived for the 1st 3 years). Adjusted to 951.60 below (we were originally told 280k parcels). | 1.00 | 24,000.00 | 24,000.00 |
| 1006 | Mnt-CSE Comparable Sales Engine / Uniformity Report Maintenance | 10.00 | 500.00 | 5,000.00 |
| 1007 | Mnt-MRA Multiple Regression Analysis (MRA) Module Maintenance | 4.00 | 500.00 | 2,000.00 |
| PS-2 | TA: Professional Services Professional Services, Term/Hours/Days: Ongoing Change Management, Business Cycle Customizations, and Continuing Premium Professional Services - On Demand; Response within 3 hours. Includes up to an | 1.00 | 12,000.00 | 12,000.00 |

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| | additional 80 hours of remote consultation/analyses per year. | | | |
| Expense | Expenses Free CAMAcloud Site Maintenance for 1st 3 years, extension @ rate of \$951.60 (less 2,268.40 discount) | 1.00 | -20,780.00 | -20,780.00 |

Comment:

Agreement Ref: RES. 18473
Account Ref: 045450056080
DCS PO Ref: 14903B

Note: Expires at end of year if renewal agreement not signed. Professional Services of \$12,000 is expected to be removed, and it's anticipated that the site maintenance credit will be removed. With no further adjustments in number of licenses or modules, 2018's total Maintenance & Support is estimated @ \$57,200.

Subtotal: \$ 48,420.00
Invoice Amount \$ 48,420.00