

Completed by County Counselor's Office			
Action Requested:	Resolution	Res.Ord No.:	20791
Sponsor(s):	Charlie Franklin	Legislature Meeting Date:	10/18/2021

Introduction
<b>Action Items:</b> ['Authorize', 'Transfer']
<b>Project/Title:</b>
Requesting authorization and awarding a contract to the International Association of Assessing Officers (IAAO -- specifically to Professional Consulting Services of IAAO, LLC) of 314 West 10th Street, Kansas City, Missouri 64105 for an audit of the Assessment Department processes and procedures, not to exceed a total amount of \$50,000.

Request Summary
<p>This project involves an audit of the processes and procedures currently employed by the Assessment Department. PCS of IAAO will review current processes and procedures in the Assessment Department to establish whether, and to what extent, there are gaps between current performance and industry standards. Both of these efforts are directed toward improving the assessment function for the benefit of Jackson County property owners.</p> <p>The existing situation in the Assessment Department will be compared to IAAO's Technical Standards to establish any existing operational gaps. PCS of IAAO is to describe in useful detail any needed changes to bring the Assessment Department into compliance with industry best practices.</p> <p>Pursuant to Chapter 1030.1 of the Jackson County Code, the Assessment Department and the Purchasing Department recommend this purchase as a Sole Source</p>

Contact Information			
<b>Department:</b>	Assessment	<b>Submitted Date:</b>	9/27/2021
<b>Name:</b>	Jeph BurroughsScanlon	<b>Email:</b>	jbs@jacksongov.org
<b>Title:</b>	Deputy Director of Assessment	<b>Phone:</b>	816-881-3256

Budget Information	
Amount authorized by this legislation this fiscal year:	\$50,000
Amount previously authorized this fiscal year:	\$ 0
Total amount authorized after this legislative action:	\$50,000
Is it transferring fund?	Yes
<b>Transferring Fund From:</b>	

## Request for Legislative Action

Fund:	Department:	Line Item Account:	Amount:
045 (Assessment Fund)	1902 (Assessment)	56080 (Other Professional Services)	\$50,000
<b>Transferring Fund To:</b>			
Fund:	Department:	Line Item Account:	Amount:
045 (Assessment Fund)	1902 (Assessment)	56010 (Auditing and Accounting Services)	\$50,000

<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:	Sole Source
Core 4 Tax Clearance Completed:	Not Applicable
Certificate of Foreign Corporation Received:	Not Applicable
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 Not Applicable for following reason: Sole Source	
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

### History

Jeph BurroughsScanlon at 9/27/2021 6:00:06 PM - [Submitted | ]  
Department Director: Jeph BurroughsScanlon at 9/27/2021 6:07:59 PM - [ Approved | ]  
Finance (Purchasing): Barbara J. Casamento at 9/28/2021 8:28:28 AM - [ Returned for more information | Either this has to be bid; or you will need to request a sole source justification through the Purchasing Department ]  
Submitter: Jeph BurroughsScanlon at 9/28/2021 12:00:16 PM - [ Submitted | Sole Source memo added. ]  
Department Director: Jeph BurroughsScanlon at 9/28/2021 12:16:43 PM - [ Approved | ]  
Finance (Purchasing): Barbara J. Casamento at 9/28/2021 12:50:56 PM - [ Returned for more information | The attached memorandum does not meet the standard for sole source purchase; familiarity with the vendor and a department's inconvenience do not make the requested vendor a sole source. What kind of research did you do? My research indicates there is at least one other vendor - Tax Management Associates - that do this type of work. ]  
Submitter: Jeph BurroughsScanlon at 10/1/2021 12:21:25 PM - [ Submitted | Updated Sole Source memo added & updated summary language; both as suggested by Purchasing.I do not know how to remove the previous memo dated 9-28-2021. ]  
Department Director: Jeph BurroughsScanlon at 10/1/2021 12:36:36 PM - [ Approved | ]  
Finance (Purchasing): Barbara J. Casamento at 10/1/2021 12:52:20 PM - [ Approved | ]  
Compliance: Katie M. Bartle at 10/1/2021 2:04:24 PM - [ Returned for more information | Professional Consulting Services of IAAO, LLC is not in compliance. They can go to [jacomocompliance.com](http://jacomocompliance.com) to apply for a Certificate of Compliance. ]  
Submitter: Jeph BurroughsScanlon at 10/7/2021 3:51:38 PM - [ Submitted | I requested that the vendor complete and submit information for a Compliance Certificate. ]  
Department Director: Gail McCann Beatty at 10/11/2021 3:18:40 PM - [ Approved | ]  
Finance (Purchasing): Barbara J. Casamento at 10/11/2021 3:40:04 PM - [ Approved | ]  
Compliance: Katie M. Bartle at 10/12/2021 9:26:16 AM - [ Approved | ]  
Finance (Budget): Mark Lang at 10/12/2021 1:11:38 PM - [ Approved | The fiscal note has been attached. ]  
Executive: Sylvya Stevenson at 10/12/2021 1:40:11 PM - [ Approved | ]  
Legal: Elizabeth Freeland at 10/14/2021 11:08:25 AM - [ Approved | ]

**Fiscal Note:**

Funds sufficient for this transfer are available from the sources indicated below.

PC# 190221014 000

Date: October 12, 2021

RES # 20791  
eRLA ID #: 254

Org Code/Description	Object Code/Description	From	To
<b>045 Assessment Fund</b>			
1902 Assessment	56080 Other Professional Services	\$ 50,000	\$ -
1902 Assessment	56010 Auditing and Accounting Service	-	50,000
		<u>\$ 50,000</u>	<u>\$ 50,000</u>

**Fiscal Note:**

This expenditure was included in the Annual Budget

PC# \_\_\_\_\_

Org Code/Description	Object Code/Description	Not to Exceed
<b>045 Assessment Fund</b>		
1902 Assessment	56010 Auditing and Accounting Services	\$ 50,000
		<u>\$ 50,000</u>

**APPROVED**  
By Mark Lang at 1:10 pm, Oct 12, 2021

Budget Office



## ASSESSMENT DEPARTMENT

(816) 881-3239  
Fax: (816) 881-1388

### JACKSON COUNTY

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

## MEMORANDUM

**FROM:** Jeph BurroughsScanlon, Deputy Director of Assessment  
**TO:** Bob Cruisinger, Director of Finance  
**CC:** Barbara Casamento, Purchasing Administrator  
Mark Lang, Budget Officer  
**DATE:** October 1, 2021  
**RE:** IAAO sole source provider

The Assessment Department has a responsibility to maintain appropriate process and procedures. As such, from time to time we need input from an outside authority on national and international best practices and our ability to meet and stay in compliance with such best practices.

The International Association of Assessing Officers (IAAO) is the preeminent international authority on governmental mass appraisal and its associated processes. IAAO sets the international standards for governmental assessment offices and is recognized world-wide as the only organization that does this type of work specifically for governmental Assessment Departments and Assessor's Offices.

This project specifically involves an audit of the processes and procedures currently employed by the Assessment Department. IAAO will review current processes and procedures in the Assessment Department to establish whether, and to what extent, there are gaps between current performance and industry standards. The existing situation in the Assessment Department will be compared to IAAO's Technical Standards to establish any existing operational gaps. IAAO is to describe in useful detail any needed changes to bring the Assessment Department into compliance with industry best practices.

All of these efforts are directed toward improving the assessment function for the benefit of Jackson County property owners. We are very familiar with IAAO and their staff. Research done by the Assessment Department and the Purchasing Department indicates there are no other vendors capable of doing this type of audit for the department.

For these reasons we believe IAAO to be a sole source vendor for this specific audit. We are requesting that a contract with IAAO of Kansas City, Missouri be approved in order to get this audit underway.

This will be funded by means of a transfer from 045-1902-56080 Assessment – Other Professional Services.