



**OFFICE OF THE
PUBLIC ADMINISTRATOR**
JACKSON COUNTY COURTHOUSE

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John Pruitt Killian
Public Administrator

MEMORANDUM

TO: Stephen Arbo
County Administrator

FROM: John Pruitt Killian *JPK*
Public Administrator

DATE: January 19, 2026

RE: Recommendation for Sole Source Contract – SEM Applications

This Memorandum sets forth my request and recommendation to award a contract to SEM Applications as a sole source vendor. SEM Applications currently provides software services to this office that support our estate notation and financial management services.

Since 2017 SEM has provided us with EMS – the Estate Management Software. EMS is a specialized, web-based client, case, and financial management system used by the Public Administrator's Office to support our clients' financial, accounting, and guardianship services operations. The system has been fully implemented and configured to meet the Department's operational workflows, reporting requirements, security controls, and compliance obligations. The Department is requesting sole source approval for the following reasons:

1. **Continuity of Operations**
EMS is an enterprise system currently in active use and contains mission-critical data. Replacing the system would require extensive data migration, system reconfiguration, staff retraining, testing, and validation. This would create unnecessary operational risk and service disruption.
2. **Unique Functional Fit**
EMS is purpose-built for fiduciary, guardianship, and related client financial management programs. The system supports integrated case management, accounting, reporting, court tracking, and compliance workflows that are not available in off-the-shelf alternatives without significant redevelopment or customization.
3. **Cost Avoidance and Risk Reduction**
A competitive procurement and transition to a new system would incur substantial additional costs, including implementation, data conversion, parallel operations, training, and potential downtime. Renewal of EMS avoids these costs and preserves institutional knowledge.
4. **Exclusive Vendor Authorization**
SEM Applications, Inc. is the sole developer, licensor, and authorized provider of EMS.

No other vendor is authorized to maintain, support, modify, or provide updates to this system.

Through EMS we track deposits and expenditures, it provides our estate accounting reports, and stores the notation and history for each estate. It conducts digital reconciliation between the accounting system and bank statements for both the Shared Account we use for indigent estates and decedent estates and the individual estate accounts. With EMS we have completely automated our inventory and accounting functions. It produces billing/fee exhibits directly.

SEM provides and maintains an internet-based server which contains our estate database. SEM performs all our database maintenance, server maintenance, and storage. This has resulted in considerable savings to our IT department both in terms of labor and expense.

The costs and burden of converting the database from SEM to another provider are costly and significant. We currently have some 1311 estates managed in EMS. The system manages a Shared Account that held an average monthly balance of approximately \$8,000,000 during the year 2025 with monthly cash flow exceeding \$1,500,000. We completed over 92,000 transactions in the Shared Account during 2025. Combined with the bank accounts other than the Shared Account, the system tracks estate assets exceeding \$27,591,911 excluding income.

The importance of those functions cannot be over emphasized. The expenditures directly provide for our clients' food and housing and care. The accounting functions are critical to fulfilling our fiduciary duty to account for our clients' assets and income. The notation portion of the database contains all of our client histories. While I have seen other companies that provide trust accounting software and medical record management, I have not found a company that provides both in a comprehensive fashion. SEM has the added benefit of being a Missouri company. The practical importance of this is that the language used in the database is the same as in the Missouri Probate Code and our practice. We have previously used databases from outside the state and found the language challenging, and in one case, unworkable.

We have tailored all our court reporting – both accountings and guardian reports -- through EMS. Working collaboratively with the Court, we have developed the reports it needs to supervise our fiduciary activities both for the individual estates and for the office generally.

SEM has largely automated our billing. As a result our billing has increased and over the last five years we are bringing in approximately \$700,000 per year.

SEM has consistently maintained compliance with the County's requirements. In the event it not allowed to continue serving our estates we will experience a significant disruption in our ability to provide for our clients and to fulfill our fiduciary duties.

Since SEM is both the developer of the software and the only maintenance provider, the maintenance agreement should be considered a Sole Source provider.