REQUEST FOR LEGISLATIVE ACTION

SUBJECT	Action Requested ☒ Resolution ☐ Ordinance Project/Title: Authorizing the purchase of a Mobile Assessor Package per the attached quotation for the Assessment Department from Data Cloud Solutions of Springfield, Ohio as a Sole Source.	
BUDGET INFORMATION *To be completed By Requesting Department and Finance*	Amount authorized by this legislation this fiscal year:	$165,100.00
	Amount previously authorized this fiscal year:	
	Total amount authorized after this legislative action:	$165,100.00
	Amount budgeted for this item * (including transfers):	$165,100.00
	Source of funding (name of fund) and account code number:	
	045-4500-56080 Assessment Fund, Assessment Non-Departmental, Other Professional Services	$ 49,500.00
	045-4500-56661 Assessment Fund, Assessment Non-Departmental, Software Purchases	$115,600.00
	Total	$165,100.00
	* If account includes additional funds for other expenses, total budgeted in the account is: $ OTHER FINANCIAL INFORMATION: ☐ No budget impact (no fiscal note required) ☐ Term and Supply Contract (funds approved in the annual budget); estimated value and use of contract: Department: Estimated Use: $ Prior Year Budget (if applicable): Prior Year Actual Amount Spent (if applicable):	
PRIOR LEGISLATION	Prior ordinances and (date): Prior resolutions and (date):	
CONTACT INFORMATION	RLA drafted by (name, title, & phone): Barbara Casamento, Purchasing Supervisor, 881-3253	
REQUEST SUMMARY	The Assessment Department would like to purchase a Mobile Assessor Package, which consists of hand held devices with applications designed to enhance appraisals throughout the entire mass appraisal process. Research by both the Assessment Department and the Purchasing Department indicates there are no other products comparable to this package currently on the market. The Assessment Department conducted a successful pilot project with the Mobile Assessor Package in 2013 and is now requesting purchase. The total cost of the package will not exceed $165,100.00 and we would pay $49,520.00 annually for the next two years for maintenance and updates of the system. Pursuant to Section1030.1 of the Jackson County Code, the Director of Finance and Purchasing recommends the purchase of the Mobile Assessor Package for the Assessment Department from Data Cloud Solutions of Springfield, Ohio as a Sole Source.	
CLEARANCE	☐ Tax Clearance Completed (Purchasing & Department) N/A ☐ Business License Verified (Purchasing & Department) N/A ☒ Chapter 6 Compliance - Affirmative Action/Prevailing Wage (County Auditor's Office)	

ATTACHMENTS	Memorandum from Mr. Ferd Niemann, Director of the Assessment Department and the Estimated Quote from Data Cloud Solutions.	
REVIEW	Department Director: *Ferd E? J°*	Date: 4/3/14
	Finance (Budget Approval): *If applicable* Lehman S Ball	Date: 4-4-14
	Division Manager: Calvin Williford by *fsch*	Date: 4/4/14
	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.

Fiscal Note:
This expenditure was included in the Annual Budget.

PC# _____

Date: April 4, 2014   ~~ORD/~~RES # 18473

Department / Division	Character/Description	Not to Exceed
045 - Assessment Fund		
4500 - Non-departmental	56080 - Other Professional Services	49,500
	56661 - Software Purchases	115,600
Total		165,100

Deborah S Ball   4-4-14

Budgeting

ASSESSMENT DEPARTMENT

JACKSON COUNTY

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Fax: (816) 881-13(

FROM: Ferdinand E. Niemann IV, Acting Director of Assessment

TO: Calvin Williford, Chief of Staff

CC: Ed Stoll; Jeph BurroughsScanlon; Lisa Honn; Troy Thomas

DATE: February 19, 2014

RE: Update on Mobile Assessor product

This memo is intended to update you on the Mobile Assessor product offered by Daniel Anderson of Data Cloud Solutions. Several Residential Unit staff have worked with the Mobile Assessor product and contributed to this memo.

Introduction

Data Cloud Solutions agreed to a thirty day test pilot project for use of the Mobile Assessor product. Four appraisers, supervisors and management were actively engaged in the training and the use of this product. Upon successful completion of the test pilot project the team unanimously recommends the full purchase of this product, at a cost of $165,100 for 2014, $49,520 for 2015 and $49,520 for 2016. Mobile Assessor is a handheld device with applications designed to enhance appraisals throughout the entire mass appraisal process. Extra features include report generation, value modeling, uniformity indices, and other customizable options. This product will accomplish the following: 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.

Background and Tasks

Previous reassessment cycles included a revaluation goal of 70,000 parcels. The field review process focused heavily on data collection, using limited technology and physically measuring every property visited. This task was very labor intensive and caused a shift away from market analysis, value modeling, and outlier review.

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The staff level of the Residential Unit at the time included twenty-three field appraisers, four clerks, two research analysts, one occupancy coordinator, two supervisors, and one deputy director. With this staff level the unit missed the targeted number of parcels by over 10,000 in 2011 and 2013. The current staffing level includes eleven field appraisers, two clerks, one research analyst, and one supervisor. One of the appraisers is tasked with managing BOE appeals, natural disasters, and assisting the supervisor with taxpayer issues. Of the remaining ten appraisers, four are assigned full time to the condo revaluation. This leaves only six appraisers to work on the remaining department tasks including revaluation, miscellaneous permits, occupancy checks, new construction, and more.

Time and Cost Savings

The revaluation process is the primary task of the department and by nature is very labor intensive, but the lack of technology exacerbated this problem. Mobile Assessor offers opportunities for time savings throughout the process for both the clerical and appraisal staffs. The process used in previous biennial reassessments was very tedious and time consuming. The process began with the selection of a reval area. The next step required a research analyst pulling a list of parcels from each neighborhood and then converting the list into a format that Sigma could read called a "pid" list. Clerks would import these lists into Sigma and print the property record cards "PRCs" for each neighborhood. This process took several weeks to complete. Mobile Assessor would eliminate the need to print PRCs and would make the "pid" list process exponentially simpler. Without the need for printing maps, paper savings are anticipated, totaling 105 boxes of paper at a cost of approximately $4,000. Additional cost savings are anticipated for ink, printing fees, and repairs to the printer.

Under the process used in previous biennial reassessments, the appraisers' initial work on the reval would include printing maps of the assigned area, marking the parcels on the map, and routing their work, a task that would take one to two hours every day for each appraiser. Appraisers in the field measured two sides of every residence, marked the sides that were

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measured on the PRC, and if changes were needed they measured the entire residence. All changes to the property were noted on the PRC. At the end of the day the appraiser would come back to the office and file the paper PRCs to be entered at a later date. This process allowed the appraisers to complete about forty parcels per day in the field and eighty parcels per day of office entry. Mobile Assessor would eliminate the need to print maps, mark maps, and create routes, saving one to two hours per day for each appraiser. Additionally, appraisers would be able to take and upload photos in a matter of seconds using Mobile Assessor. Without Mobile Assessor, uploading a photo is a labor intensive multi-step process: writing the parcel number and the photo number on a sheet of paper; downloading the photo from the camera to a "transfer" folder on the "C" drive; renaming the photo to match up with the parcel number; changing the photo to the appropriate format; moving the photo to the permanent directory on the ASMTIMAGES ("O") drive; opening Sigma; adding the photo manually into Sigma; and linking the photo to the correct parcel through additional steps of opening a location browser, opening a navigation directory, and locating the correct photo in Sigma. With the Mobile Assessor the appraiser takes the photo and the process is complete.

Increased Productivity

Increased Productivity is tied directly to the time savings. As mentioned, the old way of doing things resulted in about forty parcels per day in the field and around eighty parcels per day of entry. This works out to about fifty days of entry per appraiser. The pilot project allowed the appraisers to realize the potential time savings and increased productivity from this product. We anticipate, as Daniel promotes, productivity increases of 50-150% utilizing this new approach.

Accountability

The Mobile Assessor products will give us new accountability measures for field staff, leading to potentially increased productivity, increased safety, and better credibility as a department. Currently, appraisers report their daily work on a paper form that is entered into a spreadsheet. Audits are accomplished by adding the totals on the spreadsheet and, if needed, comparing them

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with data in Sigma. The Mobile Assessor product utilizes GPS coordinates to track the location of the iPad every three to five minutes. This provides proof to taxpayers as to when their property was visited and what changes were made at that time. It also will allow us to track appraisers, for both safety and supervisory purposes. As can be seen Exhibit A, each appraiser can be supervised and evaluated using a variety of reports.

Report Generation

Mobile Assessor provides a variety of customizable reports, allowing decision makers and supervisors to better manage personnel and processes. Audits can be done instantly and can be modified to produce a wide variety of information. For example, in just a few minutes we were able to review data from the pilot project. The four appraisers on the project checked 3,091 parcels, took 3,099 photos of those parcels, changed 1,900 conditions, and changed 386 quality calls. Without Mobile Assessor it would have taken months to find this information, making it more difficult to supervise and train personnel and to monitor their progress. Reports can show each appraiser's work and review it as soon as the parcel is marked as complete by the appraiser in the field. Supervisors can review and accept the changes or send it back to be reworked immediately. This will save the appraiser gas and time in not having to drive back and forth from the office and provide immediate feedback so we can get a more consistent and quality product. The Audit Trail reports all changes to a parcel including who made them, what day the change was made, what time the change was made, what field was changed, the new value, and the old value. Other reports track changes by appraiser, neighborhood, day, etc. The pilot product only utilized some of the functions that will be available with a full purchase and full integration.

Valuation and Modeling

Mobile Assessor also has a modeling/valuation module included. This will assist us in our market modeling and multiple regression analysis. This tool can serve as another set of eyes looking at values. This easily customizable tool makes a complex topic much simpler, allowing

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decision makers to better assess existing modeling practices. This tool was tested during training but was not included as part of the pilot project.
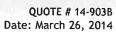
Uniformity Index

Mobile Assessor has a Uniformity Index module that takes the neighborhood statistics into consideration to establish uniform and equalized values. This information is displayed on the iPad to quickly identify whether or not a parcel fits into the assigned neighborhood. Neighborhood statistics are also shown to appraisers to help establish a framework when visiting a neighborhood. This will assist greatly in neighborhood delineation. It also will help in sales verification. This tool was tested during training but was not included as part of the pilot project.

Recommendation

The Assessment Department staff involved in the pilot project unanimously recommends the purchase of the Mobile Assessor product. The proposed budget includes funding for this purchase.

Data Cloud
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...achieving the impossible

ESTIMATE
QUOTE # 14-903B
Date: March 26, 2014

PO Box 2194, Springfield, OH 45501
service@datacloudsolutions.net

TO   Jackson County Courthouse - Assessment Department
415 E. 12th St., 1M
Kansas City, MO 64106   (816) 881-3530

SALES CONTACT	SITE	PRICE GUARANTEE	QUOTE EXPIRATION
Marlene Jeffers 816-529-9169	**Jackson County Assessment Dept.**	30 days	4/25/2014

QTY	DESCRIPTION	UNIT PRICE ($)	LINE TOTAL ($)
1	**CAMA Cloud^{SM} Site License & Implementation;** The one-time site fee for initial implementation covers all residential and commercial (RP) data-field mapping, screen layout, initial data uploads/synchronization logic, & 3 days of training. Total account size of up to 280,000 real property parcels.	n/a	50,000.00
14	**CAMA Cloud: MobileAssessor^{SM} Licenses** (3 year term); One-time license fee, UNLIMITED USE, iPad Package, w/ Data Collection, DynamicRoute^{SM}, Interactive GIS, Touch Sketching, Instant PhotoBase^{SM}.	2,500 X 14 Mobile Lic's	35,000.00
4	**CAMA Cloud: Admin Console Licenses;** Field tracking and audit trail, Real-Time Q.C. Module, Real-Time Administrative Dashboard & Reports.	$900 X 4 Desk Lic's	3,600.00
10	**Additional Training & Onsite Support Days;** 5 days Mobile/appraisers, 5 days Admin Console/supervisors (2-3 trainers).	700 x # of Days	7,000.00
1	**Uniformity Reports (Plug-In #1);** Comparable Properties Identification, 1 time setup + training. To be used to ascertain if similar properties are being uniformly assessed and to assist with informal review/appeals.	n/a	17,500.00
1	**On-the-Fly MRA Tool (Plug-In #2);** 1 time setup, Site License + Training.	n/a	9,500.00
1	**Premium Support Package (1:3) - Remote;** 150 hour discounted allotment purchase, must be used within 12 months. Includes any project or software product consultation services that may arise. Also included: **Statistical Analyses;** Error Pattern Recognition, & Outlier/Suspect Properties Identification, & Reference Values and/or Representative Sample to properly report upon any area of concern throughout the county -- to be used in conjunction with re-calibration of models as may be needed and/or to remedy inordinate data. *Standard support only includes support related to any possible software bugs.*	$95 x # of Hours	$14,250.00
1	**Premium Support Package (2:3), Executive Consultant/PMO - Onsite;** Mobile Device Mass Appraisal & Integrated Field Review Best Practices, Business Process/Requirements Analysis & Workflow Optimization. Findings applied to systems training, hands-on and/or dedicated onsite support days. Proper collection and incorporation of market data. (20 days)	$1,200 x # of Days	24,000.00
1	**Premium Support Package (3:3), Senior Business Analyst - Onsite;** Business Process, Workflow, & Change Management Analyses. Findings applied to current systems/processes as possible, or BRD provided to Executive Consultant. Assist Executive Consultant with systems training, hands-on &/or dedicated onsite support days. (5 days)	$850 x # of Days	4,250.00
	ESTIMATE TOTAL		**$165,100**

Notes:

We look forward to hearing from you soon.
THANK YOU FOR YOUR INTEREST!

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ANNUAL MAINTENANCE & SUPPORT FEES

QTY	DESCRIPTION	UNIT PRICE ($)	LINE TOTAL ($)
1	**SaaS Maintenance, Photo Repository, Field Audit History & Remote Support** (3 year term); SSL, and Guaranteed no-loss data backups & secure storage. (280k parcels)	$0.06 x Est. Parcels	16,800.00
1	**CAMA Cloud & MobileAssessor^{SM} Maintenance** (14 mobile + 4 desktop)	20% of License Fees	7,720.00
1	**Plug-In #1, (Uniformity Report) Annual Support**; SaaS, Unlimited Users	500 x 10 Seat Licenses	5,000.00
1	**Plug-In #2, (MRA) Annual Support**; SaaS, Unlimited Users	500 x 4 Seat Licenses	2,000.00
1	**Ongoing Change Management, Business Cycle Customizations, and Continuing Premium Support - On Demand**; Guaranteed response within 3 hours. Includes up to an additional 5 days onsite per year.	n/a	18,000.00
		TOTAL EST. ANNUAL COST	**$49,520.00**

Notes:

* All prices quoted are for a 3 year contractual term which does have an option to be renewed at the same rate for an additional 3 years. Annual maintenance begins 30 days after go-live/system training (whichever is later), and the pro-rated amount for a January 1 subsequent billing period is due within 60 days after go-live/system training (whichever is later).

We look forward to hearing from you soon.
THANK YOU FOR YOUR INTEREST!