

**REQUEST FOR LEGISLATIVE ACTION**

Completed by County Counselor's Office:

Res Ord No.: 5256

Sponsor(s): Crystal Williams

Date: August 19, 2019

<p>SUBJECT</p>	<p>Action Requested  <input type="checkbox"/> Resolution  <input checked="" type="checkbox"/> Ordinance</p> <p>Project/Title: <b>AN ORDINANCE</b> appropriating \$50,000 from the undesignated fund balance of the 2019 Assessment Fund for the purpose of awarding up to 2 Real Estate Appraisers to Serve as Advisors to the Board of Equalization under the terms and conditions of Request for Proposal 42-19 with a Twelve Month Contract and Three Twelve Month Options to Extend for a total of \$25,000 each not to exceed \$50,000 total.</p>												
<p>BUDGET INFORMATION  <i>To be completed By Requesting Department and Finance</i></p>	<table border="1"> <tr> <td>Amount authorized by this legislation this fiscal year:</td> <td>\$50,000</td> </tr> <tr> <td>Amount previously authorized this fiscal year:</td> <td>\$0</td> </tr> <tr> <td>Total amount authorized after this legislative action:</td> <td>\$50,000</td> </tr> <tr> <td>Amount budgeted for this item * (including transfers):</td> <td>\$15,500</td> </tr> <tr> <td>Source of funding (name of fund) and account code number;  <b>FROM:</b>  <b>045 (Assessment Fund) 32810 (Undesignated Fund Balance)</b></td> <td><b>\$50,000</b></td> </tr> <tr> <td><b>TO:</b>  <b>045 (Assessment Fund), 0112 (Legislature as A Whole), 56790 (Other Contractual Services)</b></td> <td><b>\$50,000</b></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: \$                  Prior Year Budget (if applicable):                  Prior Year Actual Amount Spent (if applicable):</p>	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	Amount budgeted for this item * (including transfers):	\$15,500	Source of funding (name of fund) and account code number; <b>FROM:</b> <b>045 (Assessment Fund) 32810 (Undesignated Fund Balance)</b>	<b>\$50,000</b>	<b>TO:</b> <b>045 (Assessment Fund), 0112 (Legislature as A Whole), 56790 (Other Contractual Services)</b>	<b>\$50,000</b>
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<p>PRIOR LEGISLATION</p>	<p>Prior ordinances and (date):                  Prior resolutions and (date): Resolution #18956 10/1/2015, 18537 6/5/2014, 18497 5/1/2014, 17908 6/4/2012</p>												
<p>CONTACT INFORMATION</p>	<p>RLA drafted by: Purchasing Supervisor, 881-3253</p>												
<p>REQUEST SUMMARY</p>	<p>Jackson County's Board of Equalization requires the services of Missouri Licensed Real Estate Appraisers to Serve As Advisors to Assist with Disputes Between Taxpayers and the County on Property Appraisals. Under Jackson County Code 9140, the County Legislature may authorize by resolution a contract with one or more qualified experts to advise the Board of Equalization. The Purchasing Department issued Request for Proposal No. 42-19 in response to those requirements.</p> <p>A total of 156 notifications were sent out and 3 proposals were received.</p> <p>Per attached memo, an RLA is being introduced for the Finance and Audit Committee and Manager of Division of Revenue to consider two respondents for a 12 month contract with the option to extend for three 12 month periods:</p> <p>Gerald Winship \$90.00 per hour at an amount not to exceed \$25,000                  TWG Associates LLC <i>dba</i> as The Williams Group \$85.00 per hour at an amount not to exceed \$25,000</p>												
<p>CLEARANCE</p>	<p><input type="checkbox"/> Tax Clearance Completed (Purchasing &amp; Department)  <input type="checkbox"/> Business License Verified (Purchasing &amp; Department)  <input checked="" type="checkbox"/> Chapter 6 Compliance - Affirmative Action/Prevailing Wage (County Auditor's Office)</p>												

ATTACHMENTS	<i>Scope of Services</i>	
REVIEW	Department Director: <i>Cassy Wooderson</i>	Date: <i>8.14.2019</i>
	Finance (Budget Approval): <i>If applicable</i> <i>[Signature]</i>	Date: <i>8/14/19</i>
	Division Manager:	Date:
	County Counselor's Office: <i>Bryan Canine</i>	Date: <i>8/19/19</i>

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:
<i>32810</i>	<i>Unencumbered Fund Balance</i>	<i>\$ 50,000</i>

- 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:**

Funds sufficient for this appropriation are available from the source indicated below.

Date: August 14, 2019

ORD # 5256


Department / Division	Character/Description	From	To
<b>045 Assessment Fund</b>			
2810 Undesignated Fund Balance		\$ 50,000	\$ -
0112 Legislature as a Whole	56790 Other Contractual Services		50,000

**Fiscal Note:**

This expenditure was included in the Annual Budget

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

Department / Division	Character/Description	Not to Exceed
<b>045 Assessment Fund</b>		
0112 Legislature as a Whole	56790 Other Contractual Services	\$ 50,000

   
 Budget Officer



**OFFICE OF THE COUNTY AUDITOR  
JACKSON COUNTY, MISSOURI**

(816) 881-3310  
Fax: (816) 881-3340  
www.jacksongov.org

**CRISSY WOODERSON  
COUNTY LEGISLATIVE AUDITOR**

auditor@jacksongov.org  
415 E. 12th Street, 2nd Floor  
Kansas City, Missouri 64106

**M E M O R A N D U M**

**TO:** Barbara Casamento – Purchasing Supervisor  
Finance & Audit Committee Members and Ed Stoll as Manager of Division of Revenue

**CC:** Melinda Taylor – BOE Specialist

**FROM:** Crissy Wooderson – County Legislative Auditor *CW*

**DATE:** August 14, 2019

**SUBJ:** Advisors to Board of Equalization

Under Jackson County Code 9140, the County Legislature may authorize by resolution a contract with one or more qualified experts to advise the Board of Equalization. Pursuant to Jackson County Code 9142 the Selection Committee shall consist of the members of the Finance and Audit Committee and the Manager of the Division of Revenue. The Selection Committee shall be responsible for soliciting advisors and recommending the appointment to the full Legislature.

Request for Proposals 42-19 seeking Advisors to the BOE was issued July 15, 2019 with a deadline to respond of August 6, 2019.

Three proposals were received, in no particular order:

1. Gerald Winship, Lee's Summit, MO
2. TWG Associates, LLC dba The Williams Group, Lee's Summit, MO
3. Bliss Associates, LLC, KCMO

Bliss Associates LLC, also responded to RFP 34-19 seeking Advisors to the Assessment Department in which the county entered into a Professional Services Contract on July 25, 2019 for \$25,000. Pursuant to RFP 42-19 Scope of Services, Section 3.3 – Respondent shall be precluded from representing any side in any appeal before the Board of Equalization. Bliss Associates, LLC would have a conflict of interest in also serving as Advisor to BOE therefore for this reason cannot be considered in the selection of RFP 42-19.

Please prepare an RLA for the next legislative meeting, August 19, 2019 for the Finance and Audit Committee and Manager of Division of Revenue to consider the two remaining respondents for a 12 month contract with the option to extend for three 12 month periods of time – Gerald Winship and TWG Associates at the respective rates of \$90/hour and \$85/hour for a total amount not to exceed \$25,000 each and make a recommendation to the Legislature.

In conversation with Administration the funding source shall be Assessment Fund, Undesignated Fund Balance 045-32810. Proposals attached.

*Harry S. Truman, Presiding Judge, 1927-1934*



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JACKSON COUNTY MISSOURI REQUEST FOR PROPOSAL NO. 42-19

# Memo

**To:** Jackson County Legislature  
**From:** Gerald Winship  
**Date:** August 5, 2019  
**Re:** Board of Equalization Advisor Appointment

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I am asking that you consider my appointment for a one-year contract as advisor to the Jackson County Board of Equalization. That position is currently open and with my extensive experience in real estate, appraising, and as serving on the BOE, I believe that I would be a highly qualified candidate.

Let me give, briefly, some of my relevant background that makes me qualified to assist the BOE in this capacity.

First, I served as a permanent, voting member of the BOE for three years, from January 2016 through 2019. During that time, I heard thousands of appeals from county residents, businesses and not-for-profit organizations, and became extremely familiar with the issues that the BOE is involved. Given the current state of the 2019 Jackson County Assessment, I believe that the BOE needs good advice and solid opinions because of the complicated issues in which they are dealing.

My experience as an appraiser and in marketing real estate for 20 years, definitely will prove useful to the BOE, given the large number of appeals that on their docket. Currently, for the last year, I have worked improving Noland Road's economic development, so I understand today's commercial climate.

Finally, I have been a Jackson County resident for more than 55 years and have a long record of public service. I have been appointed by five governors to various commissions and boards. I've served as a state senator and ran for statewide office.

I am interested in serving in this capacity at a critical time in Jackson County history. I realize this will be a challenging job that few would be interested in presently. But I am willing to make that sacrifice and serve the citizens and taxpayers, as well as the Board of Equalization, to ensure that things are done orderly, honestly, fairly and legally.

Thank you for consideration of my appointment to this position.

Sincerely,



Gerald Winship

4.8

2 Jackson Court Missouri REQUEST FOR  
State of Missouri PROPOSAL NO. 42-19

Department of Insurance, Financial Institutions and Professional Registration  
Division of Professional Registration

Missouri Real Estate Commission

Salesperson



VALID THROUGH SEPTEMBER 30, 2020

ORIGINAL CERTIFICATE/LICENSE NO. 2003013063

GERALD EUGENE WINSHIP

MCCLAIN BROTHERS REAL ESTATE L L C

14500 E 42ND ST S SUITE 100

INDEPENDENCE MO 64055

USA

*Jerry L. Moore*  
EXECUTIVE DIRECTOR

*Kathleen Steele Danner*  
DIVISION DIRECTOR



Since 1994, **The Williams Group** has served as a respected and reliable source for real property valuation. Throughout our existence, a vast majority of our assignments are sourced by repeat and referral business, which is a direct reflection of not only the quality of work which we provide, but of our ethics and reliability in general. We're equally committed to commercial and residential valuation, while also sought out for our property and market intelligence.



Now covering eleven counties in Missouri, Kansas and Wisconsin. While our primary market is Kansas City, appraisal and review assignments are routinely managed throughout the Midwest.

Together, our team of administrative, research, and real estate professionals work together to provide a full complement of commercial and residential services. In total, we currently consist of two Certified General Appraisers, one Certified Residential Appraiser, plus four full-time research and support teammates, all working in continuity to ensure quality and service excellence.

We pride ourselves on advanced technology, thorough research, reliable analysis, and clear reporting. As a team, we execute daily toward the goal of maintaining client trust.

We're looking forward to serving you!

## Sample Clients:

Due to Client privilege obligations, similar to that of a law firm, we are unable to provide a comprehensive list of Clients for the past five years. The following Clients have authorized disclosure by our firm for the purposes of this application and can attest to the quality of our work product.

- Cardwell & Associates, Inc.
  - Jack Cardwell
  - 816-836-2700
  - jackcardwell@sbcglobal.net
- Summit Bank of Kansas City
  - Julie Joos
  - 816-251-9000
  - Julie.joos@summitbankofkc.com
- Country Club Bank
  - JoAnn Wittmeyer
  - 816-751-1456
  - jwittmeyer@countryclubbank.com
- First Missouri Bank
  - Sue Ellen Richards
  - 816-903-9010
  - srichards@firstmobank.com
- Clay County Savings Bank
  - Kathryn Varnon
  - 816-781-4500 Ext. 1227
  - varnon@claycountysavings.com
- ANB Bank
  - Beth Zuercher
  - 303-394-5066
  - Beth.zuercher@anbbank.com
- Arvest Bank
  - Lara Cooper
  - 479-271-1227
  - lcooper@arvest.com
- Community Bank of Missouri
  - Michelle Rector
  - 816-776-6669
  - mrector@communitybankmissouri.com



**Justin Williams, Partner**[justinw@twg-associates.com](mailto:justinw@twg-associates.com)

A native of the Kansas City area, Mr. Williams has been involved in the real estate appraisal industry since 2003. Prior to that, he served as a management consultant, working with entrepreneurs and corporations worldwide with predominant focus on leadership development and corporate alignment. In 2004, he created the residential appraisal division within The Williams Group which, prior, was solely a commercial appraisal firm. Mr. Williams is a Certified General Appraiser, licensed in Missouri and Kansas, focused on the broad range of residential property including single-family, residences on acreage, condominiums, unique/atypical residences/mansions, and multi-family properties ranging from duplexes to apartment complexes featuring hundreds of units. Mr. Williams regularly serves as an expert witness in trial and tax appeal work. Justin earned a Bachelor of Arts degree in Psychology from the University of Missouri.

**Mark Maschger, SRA, Partner**[markm@twg-associates.com](mailto:markm@twg-associates.com)

Mr. Maschger has been involved in real estate since 1995, practicing in the areas of property management, brokerage, and real property valuation. He began working as an appraiser in 1999 and has developed a reputation for service and quality excellence. His experience includes independent appraisal practice, appraisal management for a major national bank, residential and commercial brokerage, speaking / teaching engagement, and compliance consulting. Mr. Maschger was awarded the SRA designation by the Appraisal Institute, is currently pursuing the Institute's MAI designation, and served as the 2011 President of the Kansas City Chapter of Appraisal Institute. Mr. Maschger is a Certified General Appraiser, permanently licensed in Missouri, Kansas and Wisconsin and now focused primarily on commercial valuation. He earned his Bachelor of Arts in Management from MidAmerica Nazarene University, and serves the industry in a variety of volunteer leadership and advisory roles.

**Rachel Heueisen, Senior Commercial Analyst/Business Manager**[rachelh@twg-associates.com](mailto:rachelh@twg-associates.com)

Ms. Heueisen is currently pursuing General Certification. She has contributed to the commercial workflow since 2009. She excels in small business management, striving to improve efficiency and ensure our promises are kept. Ms. Heueisen earned a Bachelor of Science with a major in Accounting from Emporia State University.

**Mike Burlingame, Senior Residential Appraiser**[mike@twg-associates.com](mailto:mike@twg-associates.com)

Mike Burlingame earned his Certified Residential Appraiser's license in 2005. His area of focus is single family valuation for conventional and FHA loans, legal and financial purposes, and private appraisals. In addition to appraising, Mike has over 20 years of experience in client relationship/account management roles. This background shaped him in the areas of expert project management, business and workflow process improvement, and delivering excellent customer experience.

**Craig Schmuke, Senior Residential Analyst**[craig@twg-associates.com](mailto:craig@twg-associates.com)

Mr. Schmuke is an apprentice for The Williams Group, conducting research and analysis, while working to become a Certified Residential Appraiser. His background centers upon commercial property and casualty insurance, and renovation project management. He earned his Bachelor of Applied Science in Information Technology from Washburn University.

**Leslie Maschger, Senior Residential Analyst**[leslie@appraisalytics.com](mailto:leslie@appraisalytics.com)

Leslie Maschger has worked in the real estate industry since 1999, including roles in business management, appraisal firm and brokerage management, and real estate marketing as a successful REALTOR. She has completed all 200 hours of qualifying education and anticipates becoming a licensed as Certified Residential Appraiser later this year. Ms. Maschger earned a Bachelor's of Science from the University of Central Missouri.

**Kristen Green, Commercial Analyst**[kristen@twg-associates.com](mailto:kristen@twg-associates.com)

Ms. Green is an apprentice for The Williams Group, working towards her General Certification. Her current role includes conducting research and analysis in assisting with both commercial and residential assignments. She earned her Bachelor of Science degree from the University of Missouri. She also has 13 years of healthcare experience as a Certified Nuclear Medicine Technologist.



## **Mark Maschger, Certified General, SRA, Partner**

Mr. Maschger has been involved in real estate since 1995, practicing in the areas of property management, brokerage, and real property valuation. He began working as an appraiser in 1999 and has developed a reputation for service and quality excellence. His experiences include independent appraisal practice, appraisal management for a major national bank, residential and commercial brokerage, speaking / instructing engagement, and compliance consulting. Mr. Maschger was awarded the SRA designation by the Appraisal Institute, is currently pursuing the Institute's MAI designation, and served as the 2011 President of the Kansas City Chapter of Appraisal Institute. **Mr. Maschger is a Certified General Appraiser, permanently licensed in Missouri, Kansas, and Wisconsin, and provides both commercial and residential valuation.** He earned his Bachelor of Arts in Management from MidAmerica Nazarene University, and serves the industry in a variety of volunteer leadership and advisory roles.

### **License, Membership & Industry Leadership**

- Wisconsin Certified General Appraiser
- Missouri Certified General Real Estate Appraiser
- Kansas Certified General Real Property Appraiser
- Licensed Real Estate Broker, Missouri and Kansas
- REALTOR® and Appraisal Institute Instructor
  - Understanding Appraisers and the Appraisal Process, for REALTORS®
  - Basic Appraisal Principles
  - Basic Appraisal Procedures
  - Various seminars approved for continuing education
- Associate Member of the CCIM Institute
- Appraisal Institute
  - SRA Designated Member
  - Candidate for MAI Designation, 2015
  - Qualified Instructor of QE and residential seminars
  - Past President, Kansas City Chapter of the Appraisal Institute, 2011
  - ILDC - Instructor Leadership & Development Conference, 2010
  - LDAC – Leadership Development & Advisory Council, 2008

### **Education**

- BA, Management and Human Relations, MidAmerica Nazarene University, Olathe, KS



### **Recent Appraisal Courses**

- Advanced Concepts & Case Studies
- Quantitative Analysis
- Advanced Market Analysis and Highest & Best Use
- Advanced Income Capitalization
- Business Practices and Ethics, 2016
- Commercial Appraisal Engagement and Review
- Supervising Beginning Appraisers: Plan for Success
- Income Approach Review: Direct Yield and Capitalization
- Business Practices and Ethics, 2014
- Sage Against the Machine: Using AVMs Wisely and Productively
- The CFPB Appraisal Rules and You
- Evaluating Commercial Construction
- General Income Approach Part II
- General Income Approach Part I
- USPAP Update (2018-19)
- The Uniform Appraisal Dataset from Fannie Mae and Freddie Mac
- Canary In the Coal Mine - Inspecting the Residential Green House
- General Report Writing and Case Studies
- General Sales Comparison Approach
- General Site Valuation & Cost Approach
- General Market Analysis & Highest and Best Use
- Litigation Skills for the Appraiser
- Valuing High Performance Residential Properties
- Appraisal Challenges: Declining Markets & Sales Concessions

### **Appraisal Courses Taught**

- Basic Appraisal Procedures
- Basic Appraisal Principles
- Litigation Assignments: Doing Expert Work on Atypical Cases
- Residential Applications: Using Technology to Measure and Support Assignments
- Rural Valuation Basics
- Appraisal of Manufactured Homes Featuring Next-Generation Manufactured Homes
- REO Appraisal: Appraisal of Residential Property Foreclosure
- Residential Design: The Makings of a Good House
- Whatever Happened to Quality Assurance: Avoiding Risky Appraisals and Risky Loans



## **Justin Williams, Partner**

State Certified General Real Estate Appraiser  
Missouri and Kansas

Justin Williams has been involved in the real estate appraisal industry for more than ten years. In 2004, he extended the offerings of The Williams Group by spearheading the residential division for the company, which previously appraised only commercial property. Prior to his time at The Williams Group, Justin served as a management consultant. He worked with entrepreneurs, business owners, and corporations throughout the world, focusing on leadership development and corporate alignment.

### **License, Membership & Industry Leadership**

- Missouri Certified General Real Estate Appraiser
- Kansas Certified General Real Property Appraiser

### **Education**

- Bachelor of Arts, Psychology  
University of Missouri, Columbia, Missouri

### **Recent Appraisal Courses**

- Principles of Capitalization
- Appraisal Reviews: Residential/Commercial
- Appraising Manufactured & Mobile Housing
- Home Inspections
- Canary in the Coal Mine – Inspecting the Residential Green House
- Building GREEN Isn't Trendy, It's Reality
- How to do a FHA Appraisal
- USPAP
- Real Estate Appraisal Methods
- Two-Four Unit Residential Case Study
- Appraising the Single Family Residence
- Foundations of Real Estate Appraisal



## **Mike Burlingame**

Senior Residential Appraiser

Mike Burlingame earned his Certified Residential Appraiser's license in 2005. His area of focus is single family valuation for conventional and FHA loans, legal and financial purposes, and private appraisals. In addition to appraising, Mike has over 20 years of experience in client relationship/account management roles. This background shaped him in the areas of expert project management, business and workflow process improvement, and delivering excellent customer experience. When Mike is not researching and analyzing market dynamics, you can find him on the golf course or with his family.

### **License, Membership & Industry Leadership**

- Missouri Certified General Real Estate Appraiser
- Kansas Certified Residential Real Property Appraiser

**Ability to Perform:**

The Williams Group is a unique firm in that we work on assignments as a team. The principals, Mark Maschger and Justin Williams, will manage all inspections of property and oversight of appraisals with our team of analysts performing research, data entry and market analysis. Additionally, we employ a Certified Residential Appraiser and are in negotiations to add another Certified General Appraiser to our team.

Our proposal is based on Mark Maschger serving as the Respondent, the person present at BOE hearings. Mr. Maschger's experience extends from standard and complex single-family residential uses to office, retail, multi-family, industrial, and complex commercial property valuation. Additionally, his attached qualifications demonstrate his experience as an instructor and expert witness. As with our traditional appraisal work, Maschger will be supported by our assembled team of appraisers and analysts. Our entire team will flex to serve the County based upon the assigned volume.

**Missouri Licenses:**



# State of Missouri

Department of Insurance, Financial Institutions and Professional Registration  
Division of Professional Registration  
Real Estate Appraisers Commission  
**State Certified General Real Estate Appraiser**

VALID THROUGH JUNE 30, 2020  
ORIGINAL CERTIFICATE/LICENSE NO. 2009019406

JUSTIN P WILLIAMS  
THE WILLIAMS GROUP  
16 SE 3RD STREET  
LEES SUMMIT MO 64063  
USA

  
EXECUTIVE DIRECTOR

  
DIVISION DIRECTOR

# State of Missouri

Department of Insurance, Financial Institutions and Professional Registration  
Division of Professional Registration  
Real Estate Appraisers Commission  
**State Certified Residential Real Estate Appraiser**

VALID THROUGH JUNE 30, 2020  
ORIGINAL CERTIFICATE/LICENSE NO. 2006012144

MIKEL J BURLINGAME  
3004 SW SADDLEWOOD DR  
LEES SUMMIT MO 64081  
USA

  
EXECUTIVE DIRECTOR

  
DIVISION DIRECTOR