

# REQUEST FOR LEGISLATIVE ACTION

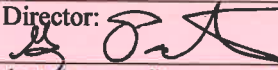


Completed by County Counselor's Office:

Res/Ord No.: 18537

Sponsor(s): Theresa Garza Ruiz

Date: June 9, 2014

<p><b>SUBJECT</b></p>	<p>Action Requested  <input checked="" type="checkbox"/> Resolution  <input type="checkbox"/> Ordinance</p> <p>Project/Title: <u>Awarding a Twenty-Four Month Contract with Two Twelve Month Options to Extend for Property Advisor Services, Eastern Jackson County, for the Board of Equalization to C. Charles Franklin of Independence, Missouri under the terms and conditions of Request for Proposal No. 40-14, at an aggregate cost to the County not to exceed \$7,500.00 annually.</u></p>										
<p><b>BUDGET INFORMATION</b>  <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>\$7,500.00</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>\$7,500.00</td> </tr> <tr> <td>Amount budgeted for this item * (including transfers):</td> <td>\$7,500.00</td> </tr> <tr> <td>Source of funding (name of fund) and account code number: 045-0301-56080 Assessment Fund, Legislative Auditor, Other Professional Services</td> <td>\$7,500.00</td> </tr> </table> <p>* If account includes additional funds for other expenses, total budgeted in the account is: \$</p> <p><b>OTHER FINANCIAL INFORMATION:</b></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:	\$7,500.00	Amount previously authorized this fiscal year:	\$	Total amount authorized after this legislative action:	\$7,500.00	Amount budgeted for this item * (including transfers):	\$7,500.00	Source of funding (name of fund) and account code number: 045-0301-56080 Assessment Fund, Legislative Auditor, Other Professional Services	\$7,500.00
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<p><b>PRIOR LEGISLATION</b></p>	<p>Prior ordinances and (date):  Prior resolutions and (date): 17908, June 4, 2012</p>										
<p><b>CONTACT INFORMATION</b></p>	<p>RLA drafted by (name, title, &amp; phone): Barbara Casamento, Purchasing Supervisor, 881-3253</p>										
<p><b>REQUEST SUMMARY</b></p>	<p>Jackson County's Board of Equalization requires the services of a Missouri Licensed Property Advisor to assist with disputes between tax payers and the County on property appraisals for Eastern Jackson County. The Purchasing Department issued Request for Proposal No. 40-14 in response to these requirements.</p> <p>A total of sixty-five notifications were distributed and one response was received as follows:</p> <p>C. Charles Franklin of Independence, MO \$75.00 per hour</p> <p>Pursuant to Section 1054.6 of the Jackson County Code, the Director of Finance and Purchasing recommends the award of a Contract for the furnishing of Property Advisor Services for Eastern Jackson County for the Board of Equalization to C. Charles Franklin of Independence, Missouri under the terms and conditions of Request for Proposal No. 40-14 as the best proposal received.</p> <p>The availability of funds for future periods is subject to annual appropriations.</p>										
<p><b>CLEARANCE</b></p>	<p><input checked="" 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	The Abstract of Bids Received, Award Recommendation from Gary Panethiere, County Auditor and the pertinent pages of C. Charles Franklin's proposal documents.	
REVIEW	Department Director: 	Date: 6-2-2014
	Finance (Budget Approval): <i>If applicable</i> 	Date: 6-2-14
	Division Manager: 	Date: 6/4/14
	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.

ABSTRACT OF BIDS

BID NO: 40-14  
 DATE: 5/20/14  
 COMMODITY: Property Advisor For BOE

Charlie  
 Franklin

NO	DESCRIPTION	UNIT	QTY	AMOUNT	AMOUNT	AMOUNT	AMOUNT	AMOUNT	
Quotation									
12	Compensation Rate Proposed for 2014 and 2015								
	Per Hour \$								
				75.00 hr					
13	Compensation Rate Proposed for 2016 and 2017								
	Per Hour \$								
				75.00 hr					

CERTIFICATION OF BID OPENING  
 BIDS WERE PUBLICLY  
 OPENED AND RECORDED  
 ON: May 20, 2014 BY [Signature]  
 CLERK OF THE LEGISLATURE  
 PURCHASING

**Barbara J. Casamento**

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**From:** Gary Panethiere  
**Sent:** Friday, May 23, 2014 12:11 PM  
**To:** Barbara J. Casamento  
**Cc:** Crissy Wooderson; Cindy L. Wallace  
**Subject:** RE: BOE Contracts 2013 and beyond

Barbra ,

Thank you for bringing up the eastern advisor proposal. Since we only received one proposal I am recommending we accept it. Thanks for your help.

Gary

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**From:** Gary Panethiere  
**Sent:** Monday, April 21, 2014 4:18 PM  
**To:** Barbara J. Casamento  
**Cc:** Crissy Wooderson; Cindy L. Wallace  
**Subject:** RE: BOE Contracts 2013 and beyond

Barbra, can you proceed with proposal 23-14 and the only response Abstract appraisals. We will use them for the western part of the county. Can you also go out for a quick proposal for the east side of the county, and hopefully we will get some responses. Thanks Gary

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**From:** Cindy L. Wallace  
**Sent:** Monday, April 07, 2014 12:50 PM  
**To:** Barbara J. Casamento  
**Cc:** Gary Panethiere; Crissy Wooderson  
**Subject:** FW: BOE Contracts 2013 and beyond

Thanks Barbara for your information.

Cindy

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**From:** Barbara J. Casamento  
**Sent:** Monday, April 07, 2014 12:48 PM  
**To:** Cindy L. Wallace  
**Subject:** RE: BOE Contracts 2013 and beyond

Cindy:

Only one response; attached is the list.

BJC

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**From:** Cindy L. Wallace  
**Sent:** Monday, April 07, 2014 12:44 PM  
**To:** Barbara J. Casamento  
**Cc:** Gary Panethiere; Crissy Wooderson; Auditor  
**Subject:** RE: BOE Contracts 2013 and beyond

Good afternoon Barbara,

Gary just handed me the proposal packet from Fred Jones received per RFP 23-14. This is a first time in my history that I can recall only receiving one response, so just wanting to be certain that we are all on the same page and that we did only received the one reply or perhaps I am misunderstanding your memo.

I see that this went to 65 potential advisors to submit bids, would you please sent a copy of the distribution list along with a copy of the bids received sheet.

Thanks so much for your help!

Cindy

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**From:** Barbara J. Casamento  
**Sent:** Friday, February 21, 2014 9:53 AM  
**To:** Cindy L. Wallace  
**Subject:** RE: BOE Contracts 2013 and beyond

Will do

BJC

**From:** Cindy L. Wallace  
**Sent:** Friday, February 21, 2014 9:26 AM  
**To:** Barbara J. Casamento  
**Cc:** Gary Panethiere; Crissy Wooderson  
**Subject:** RE: BOE Contracts 2013 and beyond

Once you make the change, if you could send one final draft to Gary to proof that would be fantastic.

Thanks!

**Cindy Wallace**  
Assistant Auditor  
Jackson County Auditor 's Office  
415 E. 12th Street , 2nd Floor  
Kansas City , MO 64106  
816.881.3312  
816.881-3340 Fax  
[cwallace@jacksongov.org](mailto:cwallace@jacksongov.org)

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**From:** Barbara J. Casamento  
**Sent:** Friday, February 21, 2014 9:25 AM  
**To:** Cindy L. Wallace  
**Cc:** Gary Panethiere; Crissy Wooderson  
**Subject:** RE: BOE Contracts 2013 and beyond

Good Morning Cindy:

Will note the change and issue the RFP in early March with a Response Deadline in earlier April, that will give us plenty of time to evaluate and award prior to May.

BJC

**From:** Cindy L. Wallace  
**Sent:** Friday, February 21, 2014 9:22 AM  
**To:** Barbara J. Casamento  
**Cc:** Gary Panethiere; Crissy Wooderson  
**Subject:** RE: BOE Contracts 2013 and beyond

Hi Barbara, Gary took a look and I have attached a sheet with a change he would like.

Thanks!

**Cindy Wallace**  
Assistant Auditor  
Jackson County Auditor 's Office  
415 E. 12th Street , 2nd Floor  
Kansas City , MO 64106  
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**From:** Barbara J. Casamento  
**Sent:** Tuesday, February 11, 2014 8:01 AM  
**To:** Cindy L. Wallace  
**Cc:** Gary Panethiere; Crissy Wooderson  
**Subject:** RE: BOE Contracts 2013 and beyond

Good Morning Everyone:

Attached is the rough draft of the RFP for the Property Advisor, I have updated it, please review and let me know what you think.

BJC

**From:** Cindy L. Wallace  
**Sent:** Thursday, January 16, 2014 12:04 PM  
**To:** Barbara J. Casamento  
**Cc:** Gary Panethiere; Crissy Wooderson  
**Subject:** RE: BOE Contracts 2013 and beyond

Hi Barbara, I forgot to mention yesterday that the contract period should begin June 1<sup>st</sup>.

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**From:** Cindy L. Wallace  
**Sent:** Wednesday, January 15, 2014 12:16 PM  
**To:** Barbara J. Casamento



**Cc:** Gary Panethiere; Crissy Wooderson  
**Subject:** BOE Contracts 2013 and beyond

Hi Barbara,

In reviewing these contracts we noticed that the contract for C. Charles Franklin has expired (December, 2013) and the contract for Abstract Appraisals/Fred Jones expires in June 2014 with an additional 2 year option extension.

This morning we discussed this in our staff meeting and would like for both contracts to get back in sync once again. With Mr. Franklin's contract currently expired we know that one needs to be bid out but we would like to go ahead and bid both out now for 2 year agreements with one additional 2 year extension as an option.

Please advise.

Thanks!

**Cindy Wallace**  
Assistant Auditor  
Jackson County Auditor 's Office  
415 E. 12th Street , 2nd Floor  
Kansas City , MO 64106  
816.881.3312  
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8.0 QUOTATIONS

1. Name: CHARUE FRANKLIN	Title: CPA
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2. Company Name: C CHARLES FRANKLIN
Company Address: 3600 C MOULD
Company City, State and Zip Code: INDEP MO 64055

3. Business Phone: (816) 252-1080	4. Fax Number: (816) 252-1080	5. Email Address: charliefranklin@comcast.net
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6. Home Address: <del>3600 C MOULD</del> 1102 W 35TH TERR
City, State and Zip Code: INDEP MO 64055

7. Home Phone: (816) 252-4456	8. Cell Phone: (816) 522-6458
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9. Are you a Missouri licensed or certified appraiser?	Yes	No <input checked="" type="checkbox"/>
10. Do you own real or personal property in Jackson County, Missouri?	Yes	No <input checked="" type="checkbox"/>
11. Are your Jackson County, Missouri real property and personal property taxes paid?		

12. Compensation Rate Proposed for 2014 and 2015	#	75	Per Hour
13. Compensation Rate Proposed for 2016 and 2017	#	75	Per Hour