

REQUEST FOR LEGISLATIVE ACTION

Completed by County Counselor's Office:

Res/~~Ord~~ No.: 19800

Sponsor(s): Dennis Waits

Date: March 26, 2018

<p>SUBJECT</p>	<p>Action Requested <input checked="" type="checkbox"/> Resolution <input type="checkbox"/> Ordinance</p> <p>Project/Title: <u>Transferring \$183,000 within the Assessment Fund Reserve Operating Accounts to the Assessment Non-Departmental Accounts to purchase Software upgrades and authorize a two year contract for Training and Consulting Services and Software Maintenance for the Assessment Department from Data Cloud Solutions of Springfield, Ohio as a Sole Source purchase.</u></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>\$183,300</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>\$183,300</td> </tr> <tr> <td>Amount budgeted for this item * (including transfers):</td> <td>\$183,300</td> </tr> <tr> <td>Source of funding (name of fund) and account code number:</td> <td></td> </tr> <tr> <td>TRANSFER FROM: 045-8006-56835 Assessment Fund, Reserve Account, Reserve Operating</td> <td>\$183,300</td> </tr> <tr> <td>TRANSFER TO: 045-4500-56662 Assessment Fund, Non-Departmental, Software Maintenance</td> <td>\$183,300</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:</p> <p>\$183,300 would be for 2018; \$86,300 for 2019 pending appropriation of the 2019 budget.</p> <p>Prior Year Budget (if applicable): Prior Year Actual Amount Spent (if applicable):</p>	Amount authorized by this legislation this fiscal year:	\$183,300	Amount previously authorized this fiscal year:		Total amount authorized after this legislative action:	\$183,300	Amount budgeted for this item * (including transfers):	\$183,300	Source of funding (name of fund) and account code number:		TRANSFER FROM: 045-8006-56835 Assessment Fund, Reserve Account, Reserve Operating	\$183,300	TRANSFER TO: 045-4500-56662 Assessment Fund, Non-Departmental, Software Maintenance	\$183,300
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<p>PRIOR LEGISLATION</p>	<p>Prior ordinances and (date): <u>5062</u> Prior resolutions and (date): 18473 4/7/14; 18934 9/21/15; and 19516 6/19/17</p>														
<p>CONTACT INFORMATION</p>	<p>RLA drafted by (name, title, & phone): Barbara Casamento, Purchasing Administrator, 881-3253</p>														
<p>REQUEST SUMMARY</p>	<p>The Assessment Department purchased the Mobile Assessor Software Program from Data Cloud Solutions of Springfield, Ohio as a Sole Source via Resolution No. 18473 dated April 7, 2014. Resolution No. 18934 dated September 21, 2015 was for additional training and consulting services and Resolution No. 19516 dated June, 19, 2017 was for training and consulting services and software maintenance.</p> <p>The Mobile Assessor Software Program has helped the Assessment Department increase efficiency and productivity for field and clerical staff; enabled supervisors to generate a variety of specific reports; improved staff accountability and credibility; supplemented existing procedures; enhanced sales verification procedures and increased the accuracy of assessments. The Assessment Department would like to purchase additional software and authorize a two-year contract for Training and Consulting Services and Software Maintenance for the Mobile Assessor Software Program.</p> <p>Pursuant to Section 1030.1 of the Jackson County Code, the Finance and Purchasing Department recommends the purchase of additional software and a two year contract for training and consulting services and software maintenance for the Assessment Department from Data Cloud Solutions of Springfield, Ohio as a Sole Source. Data Cloud Solutions is the developer of the Mobile Assessor Software Program and would be considered a sole source for software to work with this program as well as training and consulting services and software maintenance for the program.</p>														

	The Finance and Purchasing Department also recommends the following transfer within the Assessment Fund:	
	045-8006-56835 Assessment Fund, Reserve Account, Reserve – Operating	FROM: \$183,300
	045-4500-56662 Assessment Fund, Non-Departmental, Software Maintenance	TO: \$183,300
CLEARANCE	<input type="checkbox"/> Tax Clearance Completed (Purchasing & Department) N/A <input type="checkbox"/> Business License Verified (Purchasing & Department) N/A <input checked="" type="checkbox"/> Chapter 6 Compliance - Affirmative Action/Prevailing Wage (County Auditor's Office)	
COMPLIANCE	<input type="checkbox"/> MBE Goals <input type="checkbox"/> WBE Goals No goals assigned <input type="checkbox"/> VBE Goals	
ATTACHMENTS	Memorandum from Jeph BurroughsScanlon, Deputy Director of Assessment and a Quotation from Data Cloud Solutions.	
REVIEW	Department Director:	Date:
	Finance (Budget Approval): <i>If applicable</i>	Date: 3/22/18
	Division Manager:	Date:
	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.



ASSESSMENT DEPARTMENT

JACKSON COUNTY

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

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

MEMORANDUM

FROM: Jeph BurroughsScanlon, Deputy Director of Assessment
TO: Ed Stoll, Chief Administrative Officer
CC: Barbara Casamento, Purchasing Supervisor
Mark Lang, Budget Officer
DATE: March 5, 2018
RE: Data Cloud Solutions and Daniel Anderson

The Assessment Department has an ongoing need to obtain consultation/training services related to Mobile Assessor. Mobile Assessor is a product offered by Data Cloud Solutions (DCS), principal Daniel Anderson. The Jackson County Assessment Department has been actively engaged in the use of this product for four years. This product has helped the Assessment Department 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. We are familiar with Daniel Anderson and Data Cloud Solutions. We are unaware of any similar company who can offer the same services in an immediate manner as required for the seamless and consistent work of the ongoing reassessment. I believe it would be an undue burden on the department to seek out a new consultant and to bring that consultant up to speed in the short period of time needed. For these reasons we believe Daniel Anderson and Data Cloud Solutions to be a sole source vendor for the specific services we need.

We intend to sign a two year contract with DCS for 2018-19. This will most easily coincide with our state-required biennial reassessment cycle. Additionally, we want to add to our current level of licenses and software from DCS; including DeskTop Review (DTR) and Sketch Validation software and licensing, as well as some additional consulting and training. We expect the cost of these additional products, licenses, consulting and training will not exceed \$96,387.50. Our annual maintenance cost for all DCS products and services is not expected to exceed \$86,300 annually.

Our annual maintenance fee for 2018 for all previously installed and utilized DCS software is \$57,300 and is past due (January 31, 2018). In the immediate term we will make a payment to DCS in the amount of \$57,300 for annual maintenance and ongoing training for the products that we have had and continue to use. When DCS has fully implemented the new software modules and licenses we expect to be billed for a pro rata portion of the additional \$23,180 annual maintenance. This will be funded from non-Departmental funding account 045-4500-5662.

To summarize, beyond the immediate \$57,300; we will be purchasing additional goods and services from DCS not to exceed \$96,387.50 in licensing, software and consultation. We will also have up to \$23,180 in additional maintenance fees. Our total 2018 DCS expenditure would not exceed \$183,300. Our 2019 DCS expenditure would not exceed \$86,300; annual maintenance only.