

# REQUEST FOR LEGISLATIVE ACTION

Completed by County Counselor's Office:

Res/~~Ord~~ No.: 19613

Sponsor(s): Crystal Williams

Date: October 16, 2017

<b>SUBJECT</b>	Action Requested <input checked="" type="checkbox"/> Resolution <input type="checkbox"/> Ordinance  Project/Title: <u>Transferring \$26,805 within the Health Fund and awarding a Thirty-Six Month Contract to SEM Applications of Oregon, Missouri for the furnishing of Accounting Software for use by the Public Administrator's Office under the Terms and Conditions of Request for Proposal No. 61-17.</u>																								
<b>BUDGET INFORMATION</b> <i>To be completed By Requesting Department and Finance</i>	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>Amount authorized by this legislation this fiscal year:</td> <td style="text-align: right;">\$26,805</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 style="text-align: right;">\$26,805</td> </tr> <tr> <td>Amount budgeted for this item * (including transfers):</td> <td style="text-align: right;">\$26,805</td> </tr> <tr> <td>Source of funding (name of fund) and account code number:</td> <td></td> </tr> <tr> <td><b>Transfer:</b></td> <td></td> </tr> <tr> <td>From: 002-5102-56790 Health Fund, Non-Departmental, Other Contractual Services</td> <td style="text-align: right;">\$26,805</td> </tr> <tr> <td>To: 002-5102-56661 Health Fund, Non-Departmental, Software Purchases</td> <td style="text-align: right;">\$26,805</td> </tr> <tr> <td><b>Funding Summary:</b></td> <td></td> </tr> <tr> <td>002-5102-56661 Health Fund, Non-Departmental, Software Purchases</td> <td style="text-align: right;">\$26,805</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:	\$26,805	Amount previously authorized this fiscal year:		Total amount authorized after this legislative action:	\$26,805	Amount budgeted for this item * (including transfers):	\$26,805	Source of funding (name of fund) and account code number:		<b>Transfer:</b>		From: 002-5102-56790 Health Fund, Non-Departmental, Other Contractual Services	\$26,805	To: 002-5102-56661 Health Fund, Non-Departmental, Software Purchases	\$26,805	<b>Funding Summary:</b>		002-5102-56661 Health Fund, Non-Departmental, Software Purchases	\$26,805
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<b>PRIOR LEGISLATION</b>	Prior ordinances and (date): _____ Prior resolutions and (date): n/a																								
<b>CONTACT INFORMATION</b>	RLA drafted by (name, title, & phone): Kyle Brack, Senior Buyer, 881-3265																								
<b>REQUEST SUMMARY</b>	<p>The Public Administrator's Office requires a Contract for the installation, coversion, and maintenance of Accounting Software. This provides a critical day-to-day function to maintain accurance accounting and financial records for the managed estates. The Purchasing Department issued Request for Proposal No. 61-17 in response to this requirement.</p> <p>A total of forty-two (42) notifications were distributed and two (2) proposals received and evaluated as follows:</p> <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th>Respondent</th> <th>Knowledge of Fiduciary Systems (35 points)</th> <th>References (10 points)</th> <th>Qualifications and Experience (30 points)</th> <th>Pricing (25 points)</th> <th>Total Score (100 possible)</th> </tr> </thead> <tbody> <tr> <td>Computrust Software Morgan Hill, CA</td> <td style="text-align: center;">25</td> <td style="text-align: center;">5</td> <td style="text-align: center;">20</td> <td style="text-align: center;">15</td> <td style="text-align: center;"><b>65</b></td> </tr> <tr> <td>SEM Applications Oregon, MO</td> <td style="text-align: center;">35</td> <td style="text-align: center;">10</td> <td style="text-align: center;">30</td> <td style="text-align: center;">25</td> <td style="text-align: center;"><b>100</b></td> </tr> </tbody> </table>					Respondent	Knowledge of Fiduciary Systems (35 points)	References (10 points)	Qualifications and Experience (30 points)	Pricing (25 points)	Total Score (100 possible)	Computrust Software Morgan Hill, CA	25	5	20	15	<b>65</b>	SEM Applications Oregon, MO	35	10	30	25	<b>100</b>		
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	<p>The Public Administrator's Office requires notation and accounting software for the financial management of estates. The software provide notation, accounting, and check writing abilities while allowing the department to electronically reconcile both the pooled account for indigent estates and separate estate accounts. CompuTrust's total proposed cost over thirty-six months, including implementation, is \$229,240. SEM Applications' total proposed cost over thirty-six months, including implementation, is \$184,089.</p> <p>Pursuant to Section 1054.6 of the Jackson County Code, the Chief Financial Officer recommends the award of a Contract for the furnishing of Accounting Software to SEM Applications of Oregon, Missouri as the best proposal received.</p> <p>The Chief Financial Officer also requests the transfer of \$26,805 within the Health Fund as follows:</p> <table border="0" style="width: 100%;"> <thead> <tr> <th style="width: 60%;"></th> <th style="width: 20%; text-align: center;">FROM:</th> <th style="width: 20%; text-align: center;">TO:</th> </tr> </thead> <tbody> <tr> <td>002-5102-56790 Health Fund, Non-Departmental, Other Contractual Services</td> <td style="text-align: center;">\$26,805</td> <td></td> </tr> <tr> <td>002-5102-56661 Health Fund, Non-Departmental, Software Purchases</td> <td></td> <td style="text-align: center;">\$26,805</td> </tr> </tbody> </table>		FROM:	TO:	002-5102-56790 Health Fund, Non-Departmental, Other Contractual Services	\$26,805		002-5102-56661 Health Fund, Non-Departmental, Software Purchases		\$26,805
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CLEARANCE	<input type="checkbox"/> Tax Clearance Completed (Purchasing & Department) N/A <input checked="" type="checkbox"/> Business License Verified (Purchasing & Department) <input checked="" type="checkbox"/> Chapter 6 Compliance - Affirmative Action/Prevailing Wage (County Auditor's Office)									
COMPLIANCE	<input type="checkbox"/> MBE Goals – No goals assigned <input type="checkbox"/> WBE Goals – No goals assigned <input type="checkbox"/> VBE Goals – No goals assigned									
ATTACHMENTS	Public Administrator's recommendation letter, evaluation scoring matrix, and pertinent pages of SEM Applications' proposal									
REVIEW	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Department Director:</td> <td style="width: 30%;">Date: 10/10/17</td> </tr> <tr> <td>Finance (Budget Approval) <i>If applicable</i></td> <td>Date: 10/11/17</td> </tr> <tr> <td>Division Manager:</td> <td>Date:</td> </tr> <tr> <td>County Counselor's Office:</td> <td>Date:</td> </tr> </table>	Department Director:	Date: 10/10/17	Finance (Budget Approval) <i>If applicable</i>	Date: 10/11/17	Division Manager:	Date:	County Counselor's Office:	Date:	
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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: Jackson County, Missouri

Funds sufficient for this transfer are available from the sources indicated below.

Date: October 11, 2017 PC#                     

RES # 19613

Department / Division	Character/Description	From	To
<b>Health Fund - 002</b>			
5102 - Non-Departmental	56790 - Other Contractual Services	\$ 26,805	\$ -
5102 - Non-Departmental	56661 - Software Purchases		26,805
		\$ 26,805	\$ 26,805

 10/11/17  
Budget Office

OFFICE OF THE  
PUBLIC ADMINISTRATOR

## JACKSON COUNTY COURTHOUSE

415 EAST 12TH STREET, ROOM 400  
KANSAS CITY, MISSOURI 64106-2749(816) 881-3775  
FAX (816) 881-3783JOHN PRUITT KILLIAN  
PUBLIC ADMINISTRATOREmail direct to  
jkillian@jacksongov.org

## MEMORANDUM

TO: Kyle Brack, Senior Buyer  
FROM: John Killian, Public Administrator  
RE: RFP 61-17 Accounting Software  
DATE: October 3, 2017 -

The Request for Proposal 61-17 Accounting Software for the Public Administrator's Office replaces our current notation and accounting software. The desired replacement will include accounting, notation and check writing functions; conduct digital reconciliation between the accounting system and bank statements for both the pooled account we use for indigent estates and individual estate accounts; allow us to print inventories and accountings for the estates directly; allow us to produce billing/fee exhibits directly; and be internet based with hosting company performing all database maintenance, server maintenance, and storage. It will benefit the County by providing greater efficiencies, increasing billing, reducing costs to both this office and the IT Department, reducing the errors resulting from our current system, and reducing our reliance on the other additional software we use to compensate for the inadequacies of the present system.

The Management Team for the office has reviewed the inadequacies of our current system and provided guidance on its desired replacement. I applied that guidance to the two bids submitted – CompuTrust (also our current provider) and SEM Applications. In particular SEM has an enhanced ability to allow and control access, provide and organize estate and client notation, assign and organize staff tasks, print checks directly, reconcile multiple bank accounts and pooled accounts within the system, and provide accounting reports and invoicing directly. CompuTrust is unable to produce accountings in a form acceptable to our supervising court. SEM is a Missouri based company which allows it to provide reporting and systems organization consistent with Missouri probate and guardianship practice. It provides a guardianship assessment tool, not available in CompuTrust, which anticipates changes to Missouri guardianship law and provides a method to comply with the anticipated changes. SEM's references come from Public Administrators in counties that neighbor Jackson County. CompuTrust provided no Missouri references.

The SEM bid is also the most cost effective. One key difference in the pricing is that CompuTrust is based on the number of users, while SEM is based on the number of estates. The CompuTrust bid limited its proposal to 56 users at the annual rate of \$68,480, or \$204,440 for a three year bid. CT's estimate for implementation is \$23,800. The total CompuTrust bid is then **\$229,240**. SEM's proposal provides for unlimited users, and estimated that the number of estates would increase over the next three years. Its three year bid is \$157,284. Its bid on implementation is \$26,805. The total SEM bid is then **\$184,089**. Please accept this as the Public Administrator's recommendation to award RFP 61-17 bid to SEM Application. A copy of our Evaluation Matrix is attached. The amount for implementation was previously budgeted. **\$26,805** should be transferred from Health Fund, Non-Departmental, Other Contractual Services account 002-5102-56790 to Health Fund, Non-Departmental, Software Purchases account 002-5102-56661.





REQUEST FOR PROPOSAL 61-17 Evaluation Matrix

RFP NAME: Accounting Software

DEPARTMENT NAME: Public Administrator

No	Respondent	Knowledge & Understanding of Fiduciary Systems			References	Pricing	Total Score
		35 points possible	30 points possible	10 points possible			
1	Computrust Software	25	20	5	15	65	
2	SEM Applications	35	30	10	25	100	
3							
4							
5							

COMMENTS:

How to utilize Matrix:

1. Assign score from 1 (do not use "0") to the maximum points possible for each scoring category.
2. Raw scores are automatically computed into a Total Score.





**SEM Applications, Inc.**

**Res. 19613**

PO Box 583  
Oregon, Missouri 64473  
Tel: (866) 615-9344  
Fax: (816) 817-1087

**PROPOSAL**

Email: EMSsupport@semapplications.com  
Web site: http://www.semapplications.com

**Proposal Number:** 201772907

**Proposal Date:** 9/7/2017

**To:**  
Jackson County Public Administrator

**Ship To:** John Killian  
Jackson County Public Administrator  
415 E. 12th St. 4th Floor  
Kansas City, MO 64016

<i>Quantity</i>	<i>Description</i>	<i>Unit Cost</i>	<i>Total</i>
12	Year 1-EMS Web Enhanced Edition Monthly Subscription	\$3,960.00	\$47,520.00
12	Year 2-EMS Web Enhanced Edition Monthly Subscription	\$4,356.00	\$52,272.00
12	Year 3-EMS Web Enhanced Edition Monthly Subscription	\$4,791.00	\$57,492.00
Subscription Services billed monthly based on actual number of Open cases x monthly rate. Monthly rate: \$3.30 per open case, (includes 45% volume discount)		<b>SUBTOTAL</b>	<b>\$157,284.00</b>
Monthly subscription: Yr 1-1200 x 3.30 x 12 months; Yr 2- 1320 x 3.30 x 12 months; Yr 3- 1452 x 3.30 x 12 months (estimates 10% growth annually)		Tax	
		Shipping	
		<b>TOTAL</b>	<b>\$157,284.00</b>

Web subscription monthly rate includes: Volume discounts (where applicable), unlimited technical support (per SLA), group online training, server maintenance, data backups, "Closed" case storage (archived up to 7 yrs), limited "Hold" case storage (up to 50 % of Open case load), and program enhancements (as available)

\*Additional 10% monthly discount available with enrollment in Automated Credit/Debit Card Billing.

**THIS IS NOT AN INVOICE - DO NOT PAY**

If you have any questions, or would like to modify this proposal, please contact our office at (866) 615-9344.

**WE THANK YOU FOR YOUR TIME AND LOOK FORWARD TO DOING BUSINESS WITH YOU!**



## SEM Applications, Inc.

PO Box 583  
Oregon, Missouri 64473  
Tel: (866) 615-9344  
Fax: (816) 817-1087

Email: EMSsupport@semapplications.com  
Web site: <http://www.semapplications.com>

## PROPOSAL

**Proposal Number:** 2017001236

**Proposal Date:** 9/7/2017

**To:**

Jackson County Public Administrator

**Ship To:** John Killian

Jackson County Public Administrator  
415 E. 12th St. 4th Floor  
Kansas City, MO 64016

<i>Quantity</i>	<i>Description</i>	<i>Unit Cost</i>	<i>Total</i>
1	CompuTrust data conversion	\$17,220.00	\$17,220.00
1	EMS Implementation/Super User Training and Project Mgmt	\$2,955.00	\$2,955.00
1100	Initial Closed Case storage fee	\$3.30	\$3,630.00
20	Optional Customization/Report Development	\$150.00	\$3,000.00
Data Conversion: 68 hrs @ \$165 per hour; Mapping, validation, import: 40 hrs @ \$150		SUBTOTAL	\$26,805.00
Implementation/Training: 16 week Super User Training/Project Mgmt 36.5 hrs @ \$90, less 10% package discount		Tax	
		Shipping	
		<b>TOTAL</b>	<b>\$26,805.00</b>

Storage Fee: 1 time expense to store closed cases that have never been/will never be active in EMS. Based on estimate number of closed cases migrated in EMS conversion.

Optional Development: to be used as needed by County request during implementation. Development requests require County approval and are billed as completed.

**THIS IS NOT AN INVOICE - DO NOT PAY**

If you have any questions, or would like to modify this proposal, please contact our office at (866) 615-9344.

**WE THANK YOU FOR YOUR TIME AND LOOK FORWARD TO DOING BUSINESS WITH YOU!**



Anticipated 16 week Implementation Timeline:

A 16 week implementation requires a *minimum* of 4 hours weekly to be devoted to the EMS conversion by the Super User Team (2 hrs with SEM Project Manager and 2 hrs Super User Team follow up).

## Wk 1

- **Project Kick Off**  
Introduce Super User Team, finalize timeline, goals and expectations for Implementation; launch Training database; *Customer Process Review* and *Initial Report Discussion* (court reports and critical daily operation reports)
- Team to Submit reports for review (court reports and critical daily operation reports)
- Data conversion call with EMS Programmer

## Wk 2

- **Admin/User Rights/System Customization Super User Training**  
Creating/Managing User Profiles  
Assigning User Rights  
Security (IP Address, Password, Login)  
Utilities Menu/System Customization  
Second Session/Open Heartbeat
- Data extraction for Kore Tech CompuTrust conversion

## Wk 3

- **Case Management/Calendar**  
Adding a new case  
General Info/Medical screens  
Reminders/Important Dates  
Communication Log  
Dash Board/My Calendar  
Check List/Assessments (Overview)
- System Configuration/Testing in Training Database (Team)
- Status Review (PM & Team)

## Wk 4

- **Time & Expense**  
Entering Case Notes/Time tracking  
Reviewing Guardian Expenses/Case Notes  
Creating Invoices  
Recording Payments  
Reports
- System Configuration/Testing in Training Database (Team)
- Status Review (PM & Team)

## Wk 5

- **Banking & Finance (Part 1) General Finance**  
Creating bank accounts  
Setting balance warnings  
Entering transactions  
Automatic/Memorized transactions  
Bank Reconciliation  
Budgets  
Reports
- System Configuration/Testing in Training Database (Team)
- Status Review (PM & Team)

Wk 15

- Q&A session (Call #3)
- CUSTOMER staff training (conducted by Super Users)
- Update files for final data import to live data base
- Status Review (PM & Team)

Wk 16

- **Go Live!**
- Post Go Live Q&A session (Call #6)

**Request for Information (RFI) #61-17**

Jackson County, Missouri Public Administrator  
SEM Applications, Inc.

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**7.1—COMPANY PROFILE**

SEM Applications, Inc. is located in Oregon, Missouri, approximately 80 miles away from the Jackson County Courthouse. We serve the majority of the Public Administrators' offices within the state. Currently, we have six employees and about 325 customers. Twenty years of customized development working directly with guardians and fiduciaries using the product has led to the creation of an "out-of-the-box" software solution that provides an expandable framework for unlimited client management, as well as specific features for asset management, banking, assessments, and progress measurements for planning and oversight. Utility and setting tools allow for significant customization options to tailor EMS to the specific needs of each organization. This application provides an easily navigable user interface and meets the system requirements of a majority of customers with minimal required development. The framework of the EMS system not only allows for the active client and user counts, but also easily accommodates any expansion in these areas. As a 100% web-based solution, EMS can be accessed from any computer, mobile device, or smart phone, giving users increased flexibility for entering case notes, scheduling appointments and reminders, or accessing contacts or client information outside of the office setting.

SEM Applications, Inc. is a debt-free entity, and has never received financing from any public or private source for client operating costs. SEM Applications, Inc. has enjoyed an increase in new sales of at least 25% annually. We have ensured continuous growth since the founding of the company by providing an industry-specific solution at a competitive price, with outstanding customer service and support. Additionally, SEM Applications, Inc. does not have any existing liens, judgments, pending or expected litigation or previous bankruptcies within the last ten years, or any other circumstance which might materially affect the viability or stability of the organization. SEM Applications, Inc., nor any of its officers, has been involved in any bankruptcy or insolvency proceedings since the founding of the company. SEM Applications, Inc. is not currently, and has never been since the company's founding, involved in litigation either as a defendant in a customer matter or initiated by the company.

## **Request for Information (RFI) #61-17**

Jackson County, Missouri Public Administrator

SEM Applications, Inc.

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A designated Project Manager (PM), will act as the single point of contact for the County in regards to all aspects of execution and delivery of the implementation plan. The PM will interact as a liaison between the County and the SEM Applications, Inc. Lead Developer and Technical Lead to resolve project issues, track identified risks/issues, coordinate all testing, training, and conversion processes, and to complete monitoring/reporting required by the project plan. The PM will provide project oversight to ensure that all milestones and deliverables are reached on time and on budget, and conduct regular meetings with the County and stakeholders to report progress. The PM will handle all sign offs for specified deliverables confirmed by the County and is responsible for ensuring open and clear communication to all parties.

The office is staffed by a team of technical and customer support professionals to provide software services (development, technical support, training, account management). All staff members have a thorough knowledge of EMS customizations options and functionality. Staff members are trained to ask questions to identify site specific work flow, processes, and procedures to assist customers in appropriate customizations and usage issues. Users may be asked to submit report samples or other reference documents for clarification in certain situations to help build understanding.

In the event of staffing changes, the County may be assigned a secondary Project Manager to ensure that the Implementation Plan proceeds according to the agreed-upon schedule.

## Request for Information (RFI) #61-17

Jackson County, Missouri Public Administrator

SEM Applications, Inc.

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### 7.2—CLIENT REFERENCES

Megan Kennedy Stickley, Buchanan County Public Administrator

411 Jules, Room 202

St. Joseph, MO 64501

[mkennedy@co.buchanan.mo.us](mailto:mkennedy@co.buchanan.mo.us)

(816) 271-1442

Debbie Gwin, former Clay County Public Administrator

8417 Santa Fe Dr., Ste. 107

Overland Park, KS 66212

[debbieg@arcare.org](mailto:debbieg@arcare.org)

(913) 730-3872

Jera Pruitt, Platte County Public Administrator

415 3<sup>rd</sup> Street, Ste. 90

Platte City, MO 64079

[jera.pruitt@co.platte.mo.us](mailto:jera.pruitt@co.platte.mo.us)

(816) 858-3367

## **Request for Information (RFI) #61-17**

Jackson County, Missouri Public Administrator

SEM Applications, Inc.

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### **7.3—MEETING SCOPE OF SERVICES**

SEM Applications, Inc. serves customers across the country. Customers are provided with all upgrades, as well as unlimited online training and technical support. Also, all server maintenance, daily scheduled data backups, and weekly data backup verifications will be implemented by SEM Applications, Inc. There is no additional cost for these items, as they are provided within the terms of the User Agreement. Tech support specialists and trainers host online meetings through Go To Meeting and Go To Assist in order to provide remote desktop support for demonstration and issue resolution.

### **7.4—INFORMATION FOR ASSIGNED PROJECT MANAGER**

Laura Elder, Project Manager for SEM Applications, Inc., will work with Jackson County throughout the implementation process. Her contact information is as follows:

PO Box 583, Oregon MO 64473

Phone: 660-446-3030

Fax: 816-817-1087

Email: [lelder@semapplications.com](mailto:lelder@semapplications.com)

### **7.5—ADDITIONAL INFORMATION OTHERWISE UNADDRESSED**

There is no additional information to include that has not been adequately addressed elsewhere in this proposal.

## **7.6—STATEMENT OF UNDERSTANDING OF SCOPE OF SERVICES REQUIREMENTS, OVERVIEW**

SEM Applications, Inc. has the experience and demonstrated ability to successfully provide the scope of services requested by the Jackson County Public Administrator's office. Key EMS features allow users to track, manage, and control access to all pertinent data regarding wards, including but not limited to bank accounts, assets, documents and notes, staff time management, and related financial transactions including billing and disbursement processing. Data entry is uploaded in real time and is instantly available system wide, allowing users to streamline business operations by enabling them to more effectively capture and utilize organizational data. With EMS, users are able to track client activity by creating dated, time-stamped, categorized, and searchable comments along with any included billable expenses within a single screen. Users can conduct intakes, complete assessments with corresponding intervention plans, assign reminders or check list activities to monitor due dates, print checks, manage assets, and produce court accounting forms from a single application. EMS is all-inclusive and does not require additional downloads or purchases for full functionality. For administrative oversight and analysis, EMS provides more than 180 variations of formatted reports, as well as options for customizable ad-hoc reports using the Status Report Designer, Custom Rich Text Report Designer, and the built-in Custom Query Report Designer.

Implementation of the EMS application will allow the Jackson County Public Administrator's office to quickly modernize its technology and streamline business operations. The system is secure, stable, user-friendly, and offers an all-inclusive application for banking operations and case management that fully meets the specified scope of services.