

# REQUEST FOR LEGISLATIVE ACTION

Completed by County Counselor's Office:

Res/Ord. No.: 18626

Sponsor(s): Theresa Garza Ruiz

Date: October 6, 2014

<b>SUBJECT</b>	<p>Action Requested  <input checked="" type="checkbox"/> Resolution  <input type="checkbox"/> Ordinance</p> <p>Project/Title: <u>Authorizing the transfer of \$30,000.00 within the 2014 Assessment Fund and authorizing a Contract for Training and Consultation Services for the Assessment Department from Manatron/Thomson Reuters of Portage, Michigan as a Sole Source in an amount not to exceed \$30,000.00.</u></p>														
<b>BUDGET INFORMATION</b> <i>To be completed By Requesting Department and Finance</i>	<table border="1"> <tr> <td>Amount authorized by this legislation this fiscal year:</td> <td>\$30,000.00</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>\$30,000.00</td> </tr> <tr> <td>Amount budgeted for this item * (including transfers):</td> <td></td> </tr> <tr> <td>Source of funding (name of fund) and account code number:</td> <td></td> </tr> <tr> <td>From: 045-4500-56020 Assessment, Non-Departmental, Legal Services</td> <td>\$30,000.00</td> </tr> <tr> <td>To: 045-4500-56080 Assessment, Non-Departmental, Other Professional Services</td> <td>\$30,000.00</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:	\$30,000.00	Amount previously authorized this fiscal year:		Total amount authorized after this legislative action:	\$30,000.00	Amount budgeted for this item * (including transfers):		Source of funding (name of fund) and account code number:		From: 045-4500-56020 Assessment, Non-Departmental, Legal Services	\$30,000.00	To: 045-4500-56080 Assessment, Non-Departmental, Other Professional Services	\$30,000.00
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<b>PRIOR LEGISLATION</b>	<p>Prior ordinances and (date):  Prior resolutions and (date):</p>														
<b>CONTACT INFORMATION</b>	<p>RLA drafted by (name, title, &amp; phone): Barbara Casamento, Purchasing Supervisor, 881-3253</p>														
<b>REQUEST SUMMARY</b>	<p>The Assessment Department has an ongoing need to obtain Training and Consultation Services related to Systems Administrations. Manatron/Thomson Reuters is uniquely qualified to provide these services.</p> <p>Pursuant to Section 1030.1 of the Jackson County Code, the Director of Finance and Purchasing recommends the purchase of Training and Consultation Services for the Assessment Department to Manatron/Thomson Reuters of Portage, Michigan as a Sole Source.</p> <p>The Director of Finance and Purchasing also requests the transfer of \$30,000.00 within the Assessment Fund as follows:</p> <table> <tr> <td></td> <td style="text-align: right;">From:</td> <td style="text-align: right;">To:</td> </tr> <tr> <td>045-4500-56020 Assessment, Non-Departmental, Legal Services</td> <td style="text-align: right;">\$30,000.00</td> <td></td> </tr> <tr> <td>045-4500-56080 Assessment, Non-Departmental, Other Professional Services</td> <td></td> <td style="text-align: right;">\$30,000.00</td> </tr> </table>		From:	To:	045-4500-56020 Assessment, Non-Departmental, Legal Services	\$30,000.00		045-4500-56080 Assessment, Non-Departmental, Other Professional Services		\$30,000.00					
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<b>CLEARANCE</b>	<p><input type="checkbox"/> Tax Clearance Completed (Purchasing &amp; Department) N/A  <input type="checkbox"/> Business License Verified (Purchasing &amp; Department) N/A  <input checked="" type="checkbox"/> Chapter 6 Compliance - Affirmative Action/Prevailing Wage (County Auditor's Office)</p>														
<b>ATTACHMENTS</b>	<p>Memorandum from Jeph BurroughsScanlon, Deputy Director of Assessment</p>														

REVIEW	Department Director: <i>Joseph Brumby SL</i>	Date: <i>10-6-14</i>
	Finance (Budget Approval): <i>If applicable Alexander &amp; Ball</i>	Date: <i>10-6-14</i>
	Division Manager: <i>for Calvin Williford</i>	Date: <i>10/6/14</i>
	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 6, 2014

~~ORD#~~ RES#18626

<u>Department / Division</u>	<u>Character/Description</u>	<u>From</u>	<u>To</u>
<b>Assessment - 045</b>			
4500 - Non-departmental	56020 - Legal Services	30,000	
	56080 - Other Professional Services		30,000

**Fiscal Note:**

This expenditure was included in the Annual Budget.

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

Date: October 6, 2014

ORD/RES #

<u>Department / Division</u>	<u>Character/Description</u>	<u>Not to Exceed</u>
<b>Assessment Fund - 045</b>		
4500 - Non-departmental	56080 - Other professional services	30,000

*Debraant Ball 10-6-14*  
Budgeting



## ASSESSMENT DEPARTMENT

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

### JACKSON COUNTY

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

**Res. 18626**

**TO:** Barb Casamento, Finance & Purchasing Department

**FROM:** Jeph BurroughsScanlon, Deputy Director of Assessment

**CC:** Ferdinand E. Niemann IV, Director of Assessment;  
Q. Troy Thomas, Director of Finance & Purchasing

**DATE:** October 3, 2014

**RE:** Consulting agreement between Jackson County Assessment and Thomson Reuters

The Assessment Department has an ongoing need to obtain training and consultation services related to Systems Administration. Having these services provided by an outside vendor enables us to receive advice and input from an expert consultant who is uniquely qualified and knowledgeable about the Jackson County Systems Administration procedures and protocols. These services and procedures will ensure that we provide the greatest accuracy possible in developing fair and equitable real estate property assessments county-wide.

We are familiar with Thomson Reuters and their employee, Steve Wayman, as we have had a contractual working relationship with Thomson Reuters for many years and Steve Wayman is Jackson County Assessment Department's former Systems Administrator.

Because Steve has the explicit and specific experience of having been our Systems Administrator he is uniquely qualified to supply these training and consultation services. Because of his past employment with our department we are unaware of any other similar company who could possibly offer the same services. For these reasons we believe Thomson Reuters to be a sole source vendor for the specific training and services we need.

We expect that there will be a need for as many as twenty days of onsite training and consulting services over a period of six months.

Please contact me if you have any questions or concerns.