

REQUEST FOR LEGISLATIVE ACTION

Completed by County Counselor's Office:

Resolution No.: 18541

Sponsor(s): Theresa Garza Ruiz

Date: June 9, 2014

<p>SUBJECT</p>	<p>Action Requested <input checked="" type="checkbox"/> Resolution <input type="checkbox"/> Ordinance</p> <p>Project/Title: <u>Awarding a Twelve Month Contract with a Twelve Month Option to Extend for Assessment Consulting Services to John Q. Ebert and Associates of Bluffton, Ohio under the terms and conditions of Request for Proposal No. 45-14 at a annual cost not to exceed \$40,000.00.</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>\$40,000.00</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>\$40,000.00</td> </tr> <tr> <td>Amount budgeted for this item * (including transfers):</td> <td>\$40,000.00</td> </tr> <tr> <td>Source of funding (name of fund) and account code number: <div style="text-align: center;">045-4500-56080</div> </td> <td>\$40,000.00</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>Prior Year Budget (if applicable): Prior Year Actual Amount Spent (if applicable):</p>	Amount authorized by this legislation this fiscal year:	\$40,000.00	Amount previously authorized this fiscal year:		Total amount authorized after this legislative action:	\$40,000.00	Amount budgeted for this item * (including transfers):	\$40,000.00	Source of funding (name of fund) and account code number: <div style="text-align: center;">045-4500-56080</div>	\$40,000.00
Amount authorized by this legislation this fiscal year:	\$40,000.00										
Amount previously authorized this fiscal year:											
Total amount authorized after this legislative action:	\$40,000.00										
Amount budgeted for this item * (including transfers):	\$40,000.00										
Source of funding (name of fund) and account code number: <div style="text-align: center;">045-4500-56080</div>	\$40,000.00										
<p>PRIOR LEGISLATION</p>	<p>Prior ordinances and (date): Prior resolutions and (date):</p>										
<p>CONTACT INFORMATION</p>	<p>RLA drafted by (name, title, & phone): Barbara Casamento, Purchasing Supervisor, 881-3253</p>										
<p>REQUEST SUMMARY</p>	<p>The Assessment Department requires the services of a highly qualified, nationally recognized, experienced Consultant, with Assessor experience. The Purchasing Department issued Request for Proposal No. 45-14 in response to these requirements.</p> <p>A total of eight notifications were distributed and one response was received as follows:</p> <p>John Q. Ebert, Bluffton Ohio \$100.00 to \$250.00 per hour off-site \$150.00 to \$350.00 per hour on-site</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 Assessment Consulting Services for the Assessment Department to John Q. Ebert and Associates Consulting of Bluffton, Ohio under the terms and conditions of Request for Proposal No. 45-14 as the best proposal received.</p> <p>The availability of funds for future periods is subject to annual appropriations.</p>										
<p>CLEARANCE</p>	<p><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)</p>										
<p>ATTACHMENTS</p>	<p>The Abstract of Bids, a Memorandum from Jeph BurroughsScanlon, Deputy Director of Assessment and the pertinent pages of John Q. Ebert's proposal.</p>										

REVIEW	Department Director: <i>Joseph R. ...</i>	Date: <i>June 3, 2014</i>
	Finance (Budget Approval): <i>If applicable</i> <i>Robert S. Ball</i>	Date: <i>6-4-14</i>
	Division Manager: <i>Robert S. Ball</i>	Date: <i>6/5/14</i>
	County Counselor's Office: <i>Calvin Williford</i>	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

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

Res. 18541

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

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: May 28, 2014
RE: Request for Proposals No. 45-14
Assessment Consulting Services

The above referenced bid opened May 27, 2014; one proposal was received. The proposal was evaluated by senior Assessment staff members including the Director of Assessment and the Deputy Director of Assessment.

The lone company submitting a proposal was: **John Q. Ebert and Associates Consulting, LLC**, Bluffton, Ohio.

After careful review and negotiation of specific price, terms and conditions with the submitter, we recommend that this company, **John Q. Ebert and Associates Consulting**, be granted a 12-month contract, not to exceed \$40,000 (with the possibility to extend) for Assessment Consulting Services. The primary consideration in company selection is capability, experience and references.

Please contact me if you have any questions or concerns.

John Q Ebert and Associates Consulting is not a company with employees. All of our associates are independent contractors. The requirements for Minority-Owned/Women-Owned Business Enterprise (MBE/WBE) participation do not apply to our service offerings. Historically, we provide the expertise, guidance, and training of local assessment personnel to provide the necessary labor and/or staffing and would expect the local entity to follow county-specific hiring guidelines.

Compensation

John Q Ebert and Associates Consulting proposes a consultation plan using one of two options:

Option One – Fixed Period, Set Consulting Time, Set Payment Schedule

1. A four month plan according to the following approximate schedule:
 - a. Period 1 – June 10 to July 9, 2014
 - b. Period 2 – July 10 to August 9, 2014
 - c. Period 3 – August 10 to September 9, 2014
 - d. Period 4 – September 10 to October 9, 2014
2. A different plan and/or succeeding plans can be negotiated as the County might desire
3. The Company would provide a minimum of 70 consulting hours per period at a fixed cost of Twelve Thousand Dollars (\$12,000) per period.
 - a. A minimum of 40 hours would be delivered by John Q. Ebert as the lead and principal consultant
 - b. A minimum of 30 hours would be delivered by a combination of Senior Consultants Jerry Tripp, Tom Ebert, Dr. Ankrom, and Peter Korpacz. The county would have no ancillary expenses beyond the per-period cost. The company will pay all expenses for the project, including hotels, travel and meals.
4. County would provide an expense and time retainer of Six Thousand Dollars (\$6,000) at the beginning of each of the four periods). The Six Thousand Dollars (\$6,000) balance of each period is payable at the end of each respective period.
5. The County would pay according to a schedule such as below.

<u>Date</u>	<u>Amount Due</u>	<u>For</u>
June 10, 2014	\$6,000	First Period Retainer
July 10, 2014	\$12,000	First Period Balance and 2 nd Period Retainer
August 10, 2014	\$12,000	Second Period Balance and 3 rd Period Retainer
September 10, 2014	\$12,000	Third Period Balance and 4 th Period Retainer
October 10, 2014	\$6,000	Fourth Period Balance Payment in Full

Option Two

Alternatively, as an option to consider, the company would agree to provide our consultants on a basis of “as requested by the County” for up to 100 hours per month at the following rates:

John Q. Ebert	\$150 per hour off-site or \$200 per hour on-site (no expense charges)
Dr. Jeff Ankrom	\$200 per hour off-site or \$250 per hour on-site (no expense charges)
Peter Korpacz	\$250 per hour off-site or \$350 per hour on-site (no expense charges)
Jerry Tripp/Tom Ebert	\$100 per hour off-site or \$150 per hour on-site (no expense charges)

ABSTRACT OF BIDS

BID NO: 45-14 DATE: 05/27/14 COMMODITY: Assessment Consulting Service		Jerry Tripp		AMOUNT	AMOUNT	AMOUNT	AMOUNT
NO	DESCRIPTION	UNIT	QTY	AMOUNT	AMOUNT	AMOUNT	AMOUNT

See brd

Request for Proposal

CERTIFICATION OF BID OPENING
 BIDS WERE PUBLICLY
 OPENED AND RECORDED

ON: 5/27/14, BY

Dina Sciala
 CLERK OF THE LEGISLATURE
Barbara J. Cavament
 PURCHASING