

REQUEST FOR LEGISLATIVE ACTION

Completed by County Counselor's Office:
 Res/Ord No.: 19034
 Sponsor(s): Scott Burnett
 Date: January 4, 2016

SUBJECT	Action Requested <input checked="" type="checkbox"/> Resolution <input type="checkbox"/> Ordinance Project/Title: <u>Authorizing the award a Twelve Month Consulting Agreement, with two twelve month options to extend, with John Q. Ebert and Associates of Bluffton, Ohio for the Assessment Department at an annual cost to the County of \$360,000.00 as a Sole Source Purchase.</u>											
BUDGET INFORMATION <i>To be completed By Requesting Department and Finance</i>	<table border="1" data-bbox="324 577 1429 798"> <tr> <td>Amount authorized by this legislation this fiscal year:</td> <td>\$360,000.00</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>\$360,000.00</td> </tr> <tr> <td>Amount budgeted for this item * (including transfers):</td> <td>\$360,000.00</td> </tr> <tr> <td>Source of funding (name of fund) and account code number: 045-4500-56080 Assessment Fund, Non-Departmental Assessment, Other Professional Services</td> <td>\$360,000.00</td> </tr> </table> <p>* If account includes additional funds for other expenses, total budgeted in the account is: \$</p> <p>OTHER FINANCIAL INFORMATION:</p> <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: \$ _____ Prior Year Budget (if applicable): _____ Prior Year Actual Amount Spent (if applicable): _____		Amount authorized by this legislation this fiscal year:	\$360,000.00	Amount previously authorized this fiscal year:		Total amount authorized after this legislative action:	\$360,000.00	Amount budgeted for this item * (including transfers):	\$360,000.00	Source of funding (name of fund) and account code number: 045-4500-56080 Assessment Fund, Non-Departmental Assessment, Other Professional Services	\$360,000.00
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PRIOR LEGISLATION	Prior ordinances and (date): _____ Prior resolutions and (date): R#18541 June 9, 2014											
CONTACT INFORMATION	RLA drafted by (name, title, & phone): Barbara Casamento, Purchasing Supervisor, 881-3253											
REQUEST SUMMARY	<p>The Assessment Department requires the services of a highly qualified, nationally recognized, consultant with experience on mass appraisal for the 2017 reassessment. The Purchasing Department issued Request for Proposal No. 45-14 in 2014 with only one response, John Q. Ebert and Associates. Research by the Assessment Department and Purchasing Department indicates there are currently no other consultants with the experience and qualifications required to assist with the 2017 reassessment.</p> <p>Pursuant to Section 1030.1 of the Jackson County code, the Director of Finance and Purchasing recommends the award of a Consulting Agreement with John Q. Ebert of Bluffton, Ohio for the Assessment Department at an annual cost to the County of \$360,000.00 as a Sole Source Purchase.</p>											
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)											
ATTACHMENTS	Sole Source Memorandum from Ms. Lisa Honn, Senior Administrative Manager											
REVIEW	<table border="1" data-bbox="308 1722 1542 1932"> <tr> <td>Department Director:</td> <td>Date:</td> </tr> <tr> <td>Finance (Budget Approval): <i>If applicable</i></td> <td>Date: 12/30/15</td> </tr> <tr> <td>Division Manager: <i>Cabin Kelly</i></td> <td>Date: 12-30-15</td> </tr> <tr> <td>County Counselor's Office:</td> <td>Date:</td> </tr> </table>		Department Director:	Date:	Finance (Budget Approval): <i>If applicable</i>	Date: 12/30/15	Division Manager: <i>Cabin Kelly</i>	Date: 12-30-15	County Counselor's Office:	Date:		
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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.

To: Barbara Casamento, Purchasing Supervisor
From: Lisa Honn, Senior Administrative Manager
Subject: John Q. Ebert & Associates
Date: 12/29/15

Re: Request for Sole Source Purchase

On May 27, 2014, Jackson County issued RFP 45-14 for professional assessment consulting services. Eight vendors were notified of RFP 45-14 and 1 response was received from John Q. Ebert & Associates. Consequently, Resolution 18541 awarded a contract to John Q. Ebert & Associates. Subsequent addendums were also approved extending the contract to Dec. 31, 2015.

Building upon the successful completion of the 2015 Reassessment, we now desire the expertise of John Q. Ebert & Associates to continue the implementation of improved real estate appraisal practices and the use of technologies. This includes training of staff to transition from the 2015 Reassessment to a countywide 2017 Reassessment. Given the vast amount of knowledge John Q. Ebert & Associates has acquired over the past 2 years regarding previous practices, staff capabilities, and data management practices, we believe John Q. Ebert & Associates to be best suited to serve our needs as we approach the 2017 Reassessment. Additionally, as the competitively bid RFP 45-14 has shown, few professionals have the level of national expertise and experience John Q. Ebert & Associates encompasses.

For these reasons, I am requesting a sole source contract to John Q. Ebert & Associates for the purpose of managing the real estate reappraisal operations of the Department of Assessment regarding the Jackson County 2017 Reassessment. The term of the contract should be Jan. 1, 2016 – Dec. 31, 2016 with 2 1-year extension options.