

**RE: RFP # 17-DS101422016  
Housing Needs Assessment Study for the City of  
Maricopa, Arizona**

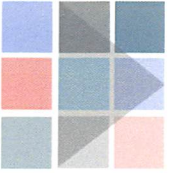
**TO:  
Kathleen Shipman  
Purchasing Manager  
City of Maricopa**

**FROM:  
Atria Planning LLC  
875 G Street Suite 505  
San Diego, CA 92101**





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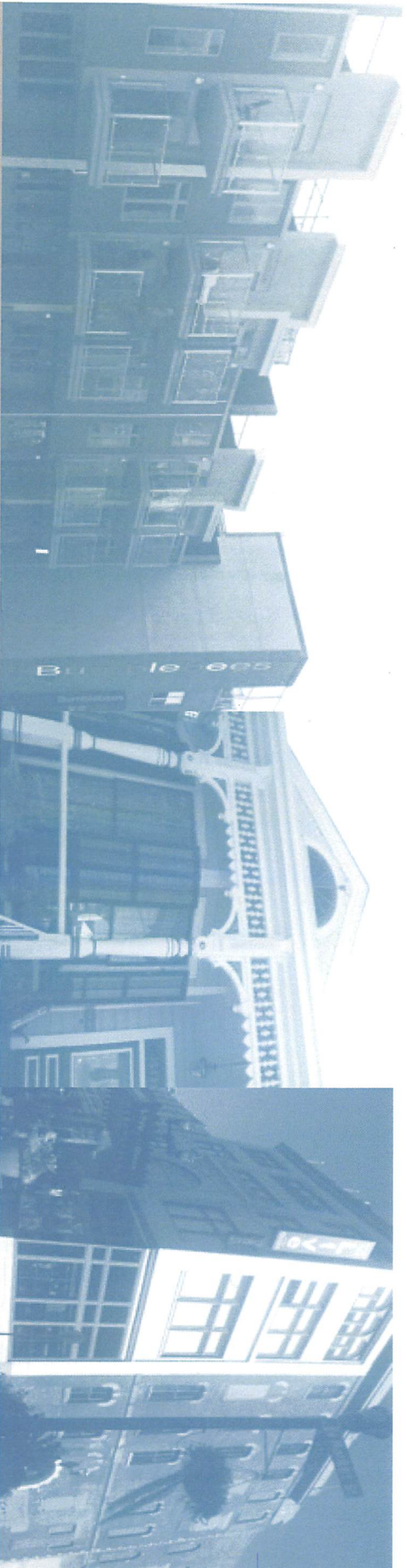
# ATRIA PLANNING

Informed planning for better communities

## City of Maricopa Housing Needs Assessment

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SUBMITTED DECEMBER 5, 2016



ATRIA PLANNING LLC

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**REQUEST FOR PROPOSALS  
 (RFP) #17-DS101422016  
 HOUSING NEEDS ASSESSMENT STUDY  
 FOR THE  
 CITY OF MARICOPA, ARIZONA**

**INTRODUCTION**

The City of Maricopa "City" will accept competitive sealed proposals from a properly qualified firm to develop a **Housing Needs Assessment Study for the City of Maricopa** at the address or physical location until the date and time detailed below. Proposals shall be delivered to the location listed below and shall be in the actual possession of the City on or prior to the exact date and time indicated below. Late proposals will not be considered.

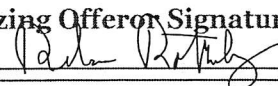
*Proposals shall be submitted in a sealed package with "RFP #17-DS101422016 Housing Needs Assessment Study for the City of Maricopa, Arizona" and the Offeror's name and address clearly indicated on the front of the package.* All proposals shall be completed in ink or typewritten. Offerors are strongly encouraged to carefully read the *entire* Request for Proposal (RFP).

<b>Pre-Bid Conference Meeting:</b>	<b>Monday, November 14, 2016 9:00 AM – 11 AM MST (Arizona Time)</b>
<b>Proposal Due Date:</b>	<b>Monday, December 5, 2016</b>
<b>Proposal Time:</b>	<b>5:00:00 PM MST (Arizona Time)</b>
<b>Number of Qualifications:</b>	<b>1 unbound original and 5 bound copies (please label original)</b>
<b>Contact:</b>	<b>Kathleen M. Shipman, Purchasing Manager</b>
<b>E-Mail:</b>	<b><u>Kathleen.Shipman@maricopa-az.gov</u></b>
<b>Mailing Address:</b>	<b>39700 W. Civic Center Plaza, Maricopa, Arizona 85138</b>
<b>Location:</b>	<b>39700 W. Civic Center Plaza, Maricopa, Arizona 85138</b>

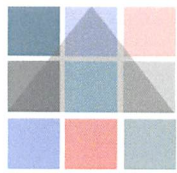
**OFFER**

To the City of Maricopa: The undersigned on behalf of the entity, firm, company, partnership, or other legal entity listed below offers on its behalf to the City a proposal that contains all terms, conditions, specifications and amendments in the Notice of Request for Proposal issued by the City. Any exception to the terms contained in the Notice of Request for Proposal must be specifically indicated in writing and are subject to the approval of the City prior to acceptance. The signature below certifies your understanding and compliance with the Terms and Conditions contained in the Request for Proposal package issued by the City.

**OFFEROR CONTACT INFORMATION - For clarification of this offer contact:**

<b>Name:</b> <u>Rebecca Rothenberg</u>		<b>Email:</b> <u>rrothenberg@atriaplanning.com</u>	
<b>Federal Employer Identification Number:</b> <u>47-4948443</u>		<b>Authorizing Offeror Signature:</b> 	
<b>Company Name:</b> <u>Atria Planning LLC</u>		<b>Printed Name:</b> <u>Rebecca Rothenberg</u>	
<b>Address:</b> <u>875 G Street Suite 505</u>		<b>Title:</b> <u>Principal</u>	
<b>City:</b> <u>San Diego</u> <b>State:</b> <u>CA</u> <b>Zip Code:</b> <u>92101</u>		<b>Telephone:</b> <u>504-875-6012</u>	
		<b>Fax:</b> <u>NA</u>	





# ATRIA PLANNING

Informed planning for better communities

December 5, 2016

Kathleen Shipman  
City of Maricopa  
39700 West Civic Center Plaza  
Maricopa, AZ 85138

Dear Mr. Shipman,

Atria Planning LLC is pleased to present the following proposal to conduct a Housing Needs Assessment and Action Plan for the City of Maricopa. We are a women-owned, small business located in San Diego with 15 years of experience conducting housing needs assessments, market analysis, and neighborhood analytics. From our work, we have the ability to collect and analyze a range of data from public and private sources, map the information using GIS, and synthesize the data to provide meaningful conclusions to our clients.

As a young firm, we are committed to providing our best services at a competitive price. We personally conduct all of the research and analysis, and will work closely with you to develop a methodology that meets the needs of the assignment. We strive to present information that is clearly understood and, while we collect a substantial amount of data, we do not bog down our studies with superfluous tables and figures. We present the critical issues, along with graphics that present the key data relevant to those issues, in a simple and straightforward way.

We also have no arrangements or relationships, formal or informal, that may interfere with the ability to provide independent and unbiased recommendations, nor are we under any litigation, administrative proceedings, or investigations.

Thank you for taking the time to review our proposal and please do not hesitate to contact me via email at [rrothenberg@atriaplanning.com](mailto:rrothenberg@atriaplanning.com) or via telephone at (504) 875-6012

Best Regards,

Rebecca Rothenberg  
Principal





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## Executive Summary

Atria Planning LLC is pleased to present the following proposal to conduct a Housing Needs Assessment for the City of Maricopa. We are prepared to engage in the assignment immediately and have the expertise and awareness of the assignment to provide City with a thorough and meticulous assessment of the current and future housing needs, and recommendations on how to meet these needs using existing programs, tools, and policy changes.

### ***We understand the scope of this assignment.***

The primary objective for the Housing Needs Assessment is to draft a clear and data-driven analysis of housing needs at various price points and typology, and then develop a plan for meeting those needs in accordance with the 2040 Vision and General Plan.

We also understand that there are social and political perceptions regarding non-single family residential housing, and it will be critical to emphasize how diverse housing types that meet the needs of different types of families and workers is necessary for economic development, bringing in new amenities, and growing sustainably. We have extensive experience in crafting needs assessments that are easily understood by the general public, and illustrate why diverse housing is important for successful (and even wealthy) communities. We have accomplished this for local jurisdictions, counties, and states.

### ***We specialize in affordable housing and neighborhood development.***

Our team at Atria Planning LLC specializes specifically in affordable housing and market analysis, and we have worked with State housing agencies, PHAs, and CDBG entitlement communities to assess housing needs, provide technical assistance in program design and implementation, and conduct training sessions. We have provided ongoing support to our clients over several years. This includes a five-year engagement with the Louisiana Housing Finance Agency after Hurricane Katrina, and assistance to HUD for their Choice Neighborhoods Program compliance reporting. We have an

in-depth understanding of federal programs, local tools, and the current requirements for Fair Housing under the new FHHA Ruling.

### ***We are skilled in working with data and market research.***

We manage and analyze big data. The principals of the firm have worked with large datasets from public and private sources to understand existing conditions and frame information in a manner that is meaningful to our clients. This includes post-storm needs assessments in New York, New Jersey, Pennsylvania and Indiana (working with 100,000 + individual records combined with FEMA, insurance, Census and labor statistics data), FMR research for Louisiana on behalf of state agencies, and Neighborhood Opportunities mapping for the Puerto Rico Housing Administration. We have developed an approach to data that is useful to our clients, and provide all information in formatted and cataloged workbooks.

### ***We present information in a way that is understandable and useful.***

Our approach is built from first-hand experience working closely with community leaders and stakeholders; for this reason, our studies are very approachable and easy to read. We strive to present information that is clearly understood and, while we collect a substantial amount of data to convey market conditions, housing needs, and neighborhood characteristics, we do not bog down our studies with superfluous tables and figures. We present the critical issues, along with graphics that present the key data relevant to those issues, in a simple and straightforward way.

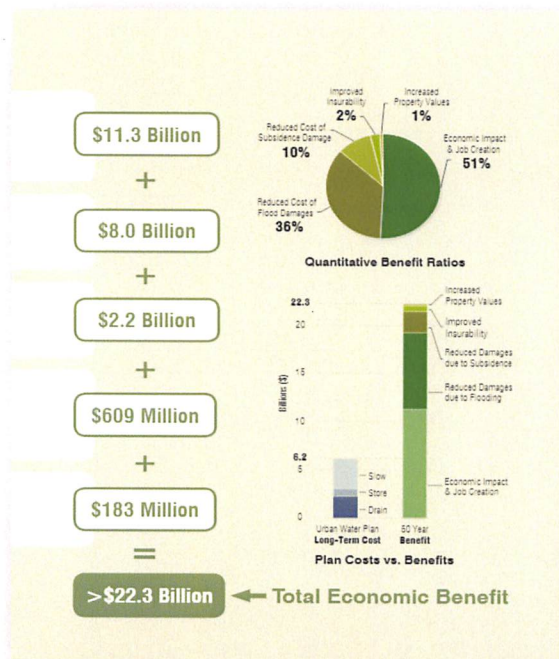
### ***We are a small, women-owned business.***

As a young firm, we are committed to providing our best services at a competitive price. We personally conduct all of the research and analysis, and will work closely with you to develop a methodology and communications protocol that meets the needs of the project. We are also based in San Diego, in (relatively) close proximity to Maricopa, and will be available to meet in-person on a regular basis.



## Firm Overview

Atria Planning LLC is a small, women-owned business that specializes in housing needs assessments, affordable housing, community development and market analysis. In particular, we help organizations assess current conditions and future potential through research of demographic, financial, and physical characteristics. It sounds simple, but oftentimes large amounts of data are overwhelming, and if not looked at as a whole, do not lead to meaningful information. This is where we focus our attention – we weave large amounts of information together to transform data into stories about our neighborhoods.



With more than fifteen years of experience, we have developed a well-rounded approach that goes beyond standard demographic reports and market analysis. Like most studies, we collect and analyze robust data and then generate models based on forecasts.

But it is what we do with that information that sets us apart. We focus on synthesizing multiple pieces of information to tell a story, and then explaining that story in a manner that everyone can understand through simple explanations combined with visually stimulating graphics and maps.

We also strongly believe that market research is not just a formality to get projects approved, but are intended to mold policy and assist communities in planning for their future. That is why we put so much emphasis on delivering reports that are readable, interesting, concise and meaningful – so that policy-makers can make informed decisions. Our reports are not loaded with superfluous charts and tables, but rather present the most salient points in an easy-to-read format, and supplemented with the background information within appendices and supporting databases.

Relevant to this RFP, we have conducted all of the research and authored the reports for the following projects:

- Housing Needs Assessment for the Delaware State Housing Authority
- Market Analysis and Neighborhood Opportunities Analysis for 300+ public housing sites in Puerto Rico for the Puerto Rico Housing Administration
- Market Analysis and Neighborhood Revitalization Strategies for the Housing Authority of Shreveport and Shreveport Office of Community Development
- Workforce Housing Needs Assessment for Habitat for Humanity, St. Tammany
- Tenant Landlord Housing Choice Voucher Portal for the Housing Authority of New Orleans





- Housing Needs Assessments for CDBG-DR Programs (States of Indiana, Louisiana, New York, New Jersey, Pennsylvania, Habitat for Humanity)
- Five-Year Strategic Plan for Real Estate Planning and Development for the Housing Authority of New Orleans
- Rent Reasonableness Study and market analysis for rental housing throughout Louisiana post-Katrina on behalf of two State agencies (Louisiana Housing Finance Agency and Office of Community Development)
- Retail Market Analysis (projects in Louisiana, Maryland, Florida, Delaware, and South Carolina)
- Market Analysis and positioning strategies for large mixed-use sites (Central Florida, and Houston)

We also approach our work with a mind towards solutions that are financially realistic. This means coming up with recommendations that address identified needs in a manner that is fiscally responsible and in agreement with the vision and goals of the community.

At Atria, we are passionate about what we do - **helping clients build stronger communities and improving the lives of residents through economic opportunity and quality neighborhoods.**

### *Product Integrity*

Our work doesn't just sit on a shelf - we empower clients with usable data and a means to use the information for critical decisions. Upon completion of projects, we deliver all data sources, maps, and analyses in clearly organized, labeled and coded Data Workbooks that can be used for future work. Atria is deliverable oriented and we are committed to providing usable work products to our clients.

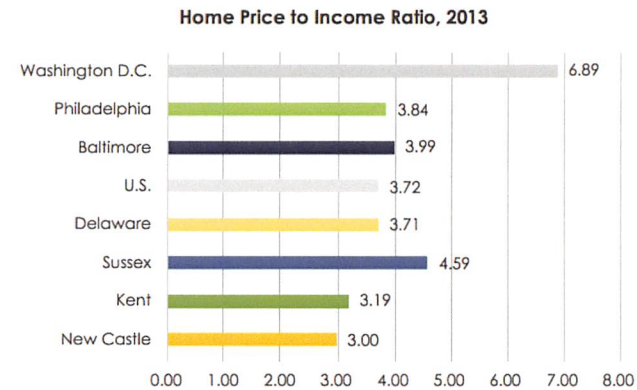


FIGURE 1 CHART FOR THE DELAWARE HOUSING NEEDS ASSESSMENT, 2015 - 2020, EMPHASIZING AFFORDABILITY ISSUES IN SUSSEX COUNTY

### *The Advantage*

We are a young firm, and are striving to bring our vision forward – to make information meaningful, clear and accessible to decision-makers so that they are empowered to make the best choices for their community. The Principals of the firm will conduct all work associated with the project and are committed to personally working closely with Maricopa and its partners. We are based in downtown San Diego, and can work with Maricopa in-person through the duration of the contract.



## Past Projects

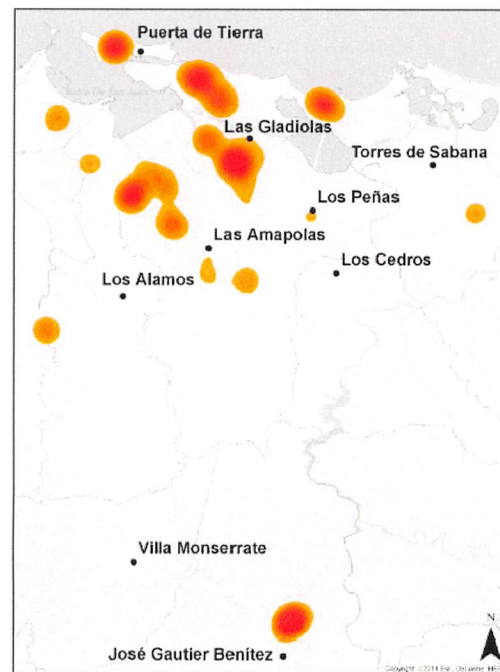
### Puerto Rico Market Analysis and Areas of Opportunity Study for the Strategic Plan, Puerto Rico Housing Administration

In 2014, Ms. Rothenberg led the research and authored a report on market conditions and neighborhoods of opportunity for the Puerto Rico Housing Administration's 380+ public housing sites. In this capacity, she served on a larger team that examined site conditions, financing, and overall real estate development strategies. This component specifically addressed the following:

1. What are the economic conditions for each of the 380+ public housing sites, and which sites could support mixed income housing given current rents and sale prices in the neighborhood
2. Which public housing sites are located in "areas of opportunity," here defined by several factors, including:
  - a. Demographic indicators (educational attainment, income, poverty rates)
  - b. School quality
  - c. Access to transportation and jobs
  - d. Neighborhood amenities, like grocery stores, pharmacies, and public facilities

The neighborhoods of opportunity were determined using an algorithm of weighted averages based on these four key factors. Then the 380+ sites were categorized into three tiers, with the top tier highlighting the public housing sites that offer the greatest opportunities for mixed income housing in well-served neighborhoods.

The PRHA is well under way with developing three of the sites identified as Tier 1 properties.



MAP 2 - JOB CLUSTER HEAT MAP

#### JOB CLUSTER HEAT

The neighborhood assessment includes an analysis of job centers located throughout Puerto Rico in relation to the nine targeted sites.

The orange shadings represent a "heat map", or the concentration of jobs located within a given area. The larger the orange shading, the larger the job center in terms of geographic area; the darker the shading, the greater number of jobs within a focused area.

The data is provided by Dun and Bradstreet (D&B) for all employers using 2012 tax return information. The data includes total employees, revenue, companies, and industry, by address.

The map is limited to the records reported by D&B.





## Delaware Housing Needs Assessment, 2015-2020

### Delaware State Housing Authority

From July 2013 through September of 2014, Ms. Rothenberg and Ms. Colopinto served as project manager and principal analyst for the Delaware Housing Needs Assessment on behalf of the Delaware State Housing Authority. The purpose of the project was to develop a 5-year housing demand model to support developers; and to analyze prescient housing conditions that impact housing programs and land use.

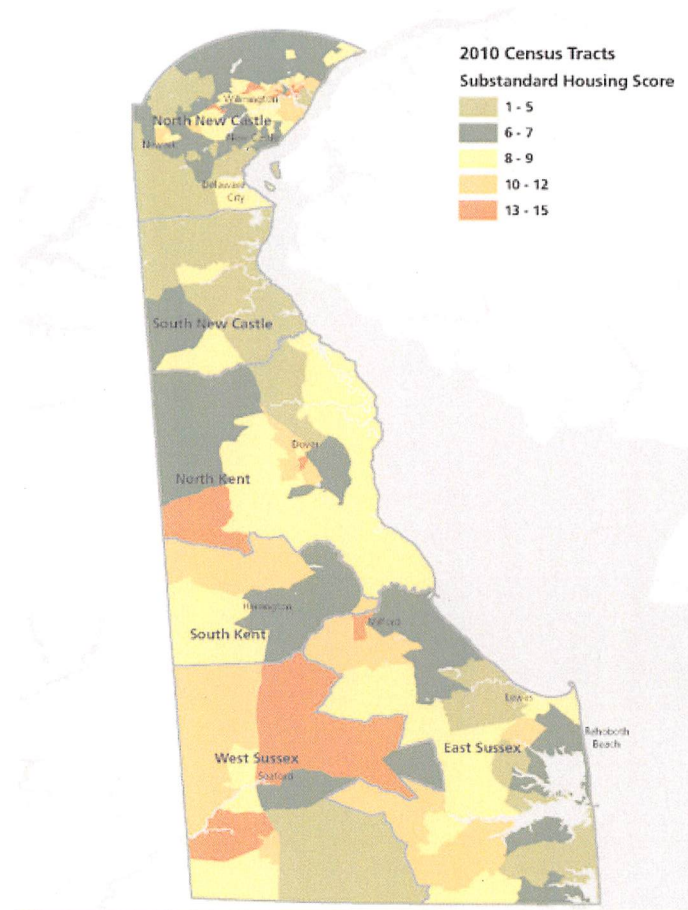
The analysis included a detailed assessment of HUD CHAS data to illustrate housing needs of existing low and moderate income households by submarket area. This was followed by a forecast of household growth in each of the six submarket areas, and an estimated demand for new housing units, taking into account units that had already been permitted but not yet constructed.

The study delves further in qualitative analysis and touches upon key issues facing many communities today. For example, the challenges of first-time homeownership, and the lack of interest in owning homes among many younger households, has an impact on the kind of housing most in demand. Additionally, Delaware saw a tremendous influx of retirees in the past decade, fueling demand for aging-in-place homes and greater accessibility.

The final report included an analysis of blight, special needs, homeless, the rural population, areas of high poverty, and the expiration of subsidized housing operating agreements.

The study can be found here:

<http://www.destatehousing.com/FormsAndInformation/needs.php>





## CDBG-DR Multi-Family Housing Program

Terrebonne Parish

From 2012 to 2014, Ms. Rothenberg managed the CDBG-DR Workforce Housing Multi-Family Program on behalf of Terrebonne Parish. The goal of the program was to encourage quality developers to build affordable workforce rental housing in Houma, targeting households earning between 50% and 80% AMI.

In this role, she drafted the RFP, developed the scoring criteria for selecting developers, reviewed developer proposals, and made a recommendation to parish staff and elected officials on which proposal to select based on financial feasibility, developer experience, and merits of the proposed development.

After selection, Ms. Rothenberg developed underwriting criteria and the processes for CDBG requirements, including Davis Bacon, Section 3 and ADA requirements.

The selected project, Bayou Cane Apartments, is completed. A summary of the project can be found here:

<http://www.rndcnola.org/#!/bayou-cane-apartments-/c12c8>



## Indiana Disaster Impact Study (2015 – 2016)

Indiana Housing and Community Development Authority

Atria recently completed a housing study for the Indiana Housing and Community Development Authority to assess the impact of three flooding events in 2008, and how \$120 million in CDBG-DR housing investments addressed housing needs.

Atria Planning developed a methodology to determine and quantify the impact of the disaster on the State's households at the Census Tract-level using FEMA Individual Assistance records, SBA data, and Census data alongside CDBG-DR investment data. This includes the analysis of more than 70,000 records and over \$100 million in investments, geocoding and mapping the information, and providing demographic and economic summaries of impacted areas by Census Tract, Place, and County.

The final report includes an analysis of damage, identifying vulnerable populations and households with special needs, and recommendations on where to invest the remaining resources in areas with vulnerable populations that indicate struggles in rebuilding. The final report highlighted the neighborhoods still likely in need of additional recovery funds.

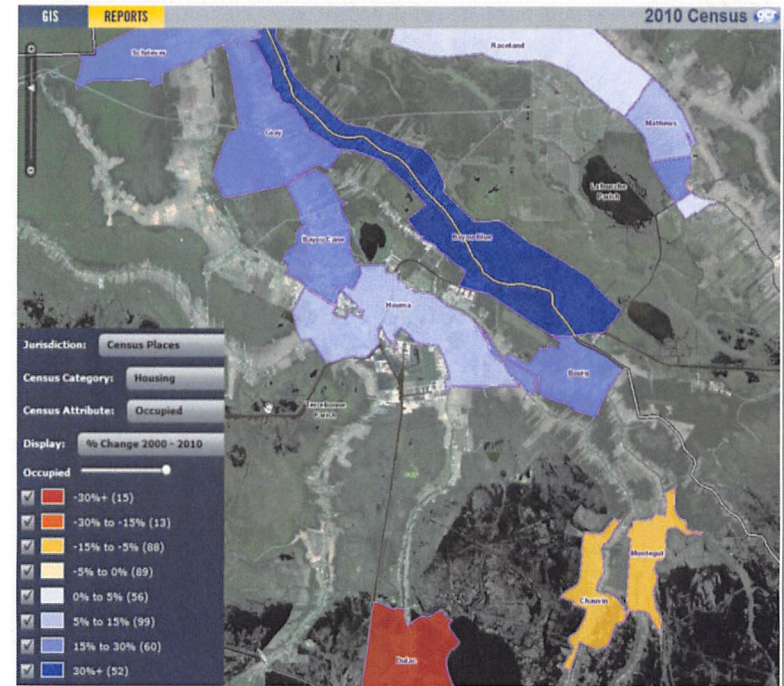


## Housing Needs Assessments and Technical Advisory Services

The Louisiana Housing Finance Agency

For four years after Hurricane Katrina, Ms. Rothenberg served as lead consultant for market analysis, housing needs assessments, rent studies, pipeline reports, and congressional testimony to track recovery and provide information documenting ongoing housing needs. In this time period, Ms. Rothenberg worked closely with the Executive Director and key staff on several critical projects, including the following:

- Statewide Housing Needs Assessments in 2006, 2008, and 2010
- Authored Agency's Strategic Plan, 2007-2016
- Provided staff training for HDS Underwriting software
- Provided advisory services for policy development in the post-storm GO Zone Qualified Allocation Plan
- Developed a LIHTC underwriting model integrated with HDS Underwriting software
- Reviewed market analyses for GO Zone LIHTC applications to ensure no market would be saturated given the 10 times increase in LIHTC post-Katrina
- Drafted congressional briefings documenting ongoing housing needs
- Conducted a detailed Market Analysis of the New Orleans Housing Market in 2010 in partnership with the University of New Orleans







### Unmet Needs Assessments for CDBG-DR Action Plans (2013-2015)

New Jersey Department of Community Affairs, New York Governor's Office of Storm Recovery, Pennsylvania Department of Housing and Community Development

Ms. Rothenberg and Ms. Colopinto addressed housing unmet needs for New Jersey, New York, and Pennsylvania. The analysis was used to draft the CDBG-DR Action Plans, to inform the allocation of funds, and to develop policies and programming for the recovery. In all cases, the team worked across several State Agencies, such as Health and Human Services, Housing Finance Agency, and Environmental Protection, to assess housing damage from a quantitative and qualitative perspective.

In each project, the team geocoded and analyzed over 100,000 FEMA Individual Assistance records, FEMA PA data, SBA data, insurance information, and supplemental data provided by State agencies to determine housing unmet needs. The analyses were conducted at the household level and then aggregated to Census Tract, Municipality, and County. The results were categorized by renter and owner; LMI and Urgent Need; public housing; and special needs housing.

Ms. Rothenberg served as a Principal Author for the Unmet Need section of the Action Plans for New York and New Jersey, found here:

[http://stormrecovery.ny.gov/sites/default/files/uploads/apa\\_6\\_final\\_hud\\_approved.pdf](http://stormrecovery.ny.gov/sites/default/files/uploads/apa_6_final_hud_approved.pdf)

<http://www.state.nj.us/dca/announcements/pdf/CDBG-DisasterRecoveryActionPlan.pdf>







### Residential Zoning Analysis (2012)

Maryland-National Capital Park & Planning Commission,  
Montgomery County Planning Department

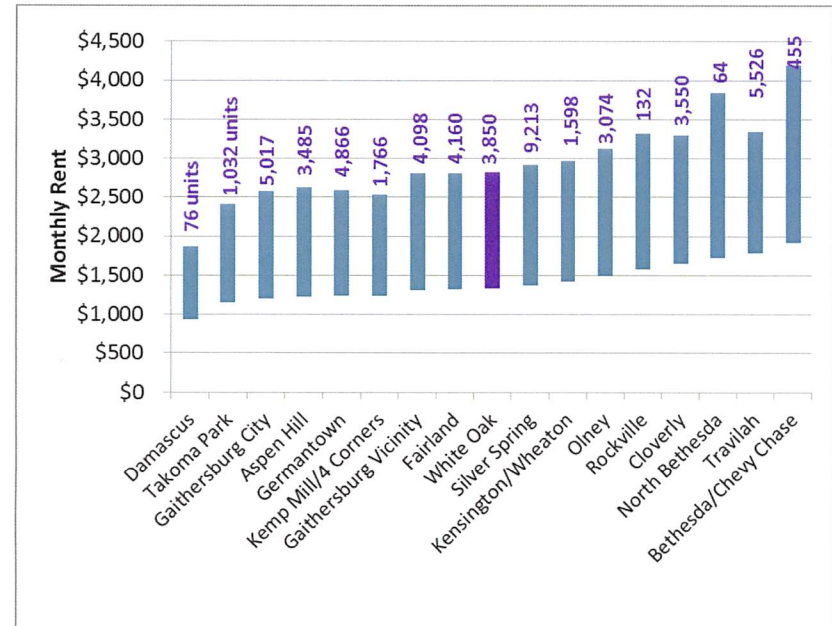
As a Senior Research Planning with Montgomery County Planning, Ms. Colopinto led an analysis of proposed residential zoning density changes in several Montgomery County neighborhoods. Specifically, Ms. Colopinto developed a methodology to assess the impact that zoning density changes will have on existing market affordable rental housing.

Ms. Colopinto assessed the asking rents or sales structure, the age, condition, and vacancy status of existing multi-unit residential properties for that specific neighborhood. Ms. Colopinto then analyzed the financial costs associated with redeveloping a multi-unit property in that same neighborhood and the expected rents or sale prices that would be required to support the cost of redevelopment. To conduct this analysis, Ms. Colopinto utilized data from an annual rental survey of existing rents and vacancies, recent sale transaction data, and conversations with property managers and developers to determine asking rents or sales and accurate costing for new development. She used GIS to illustrate

Each analysis was presented before the Montgomery County Planning Board and was used to develop zoning recommendations in master or sector plans. The analysis is now a standard component of master and sector plans and serves to ensure that planners make decisions that encourage and preserve affordable housing.

An example of this analysis can be found here:

<http://www.montgomeryplanning.org/community/glenmont/documents/GlenmonthousinganalysisDec2012.pdf>



GRAPH OF AVERAGE LOW & HIGH ASKING RENTS AND THE NUMBER OF AT-MARKET UNITS IN MULTI-FAMILY APARTMENT BUILDINGS BY PLANNING AREA

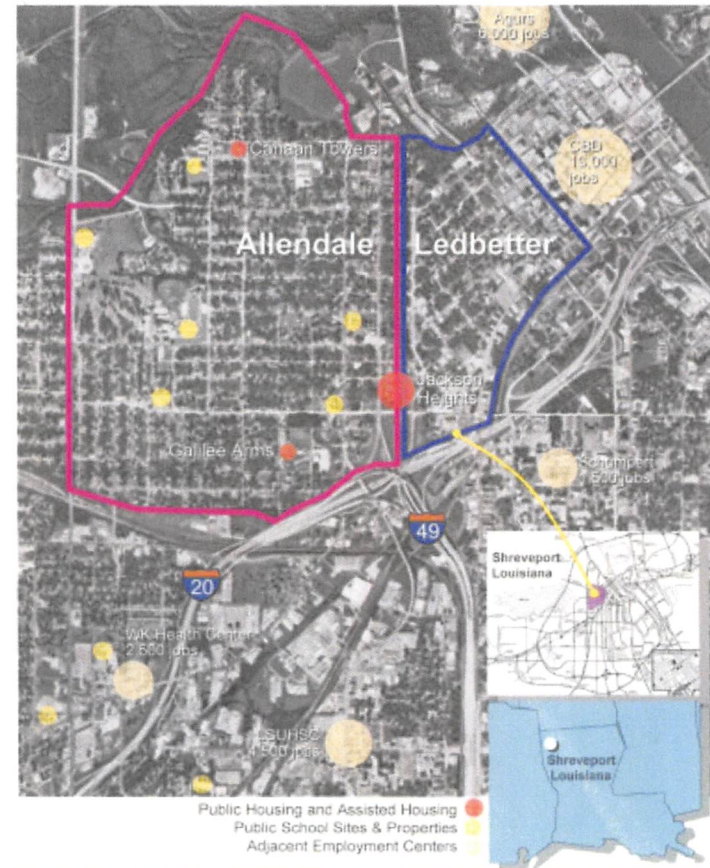


## City of Shreveport, Revitalization Strategies for Six Neighborhoods and Choice Neighborhoods Implementation Grant Application

In 2013, Rebecca Rothenberg served as project manager, chief researcher and principal author of the Shreveport Revitalization Strategies for six targeted neighborhoods identified by the Shreveport Office of Community Development. The work supported the City's HUD Choice Neighborhoods Planning Grant and the Comprehensive Plan developed by Goody Clancy. For this project, Ms. Rothenberg assessed market conditions for housing and retail development in six neighborhoods, and then developed feasible growth scenarios based on the analysis. The study also recommended prioritizing the downtown and Ledbetter Heights neighborhoods as a catalyst for regional growth. A portion of this study is available online at:

[ftp://74-93-136-34-memphis.hfc.comcastbusiness.net/hud/Shreveport%20Housing%20Study\\_DRAFT\\_just%20choice.pdf](ftp://74-93-136-34-memphis.hfc.comcastbusiness.net/hud/Shreveport%20Housing%20Study_DRAFT_just%20choice.pdf)

In 2016, Ms. Rothenberg served as senior advisor and principal author of the CN Implementation Grant application. This included selecting a Development Team, coordinating community engagement and public meetings, providing expertise on structuring the People investments, identifying target housing sites, and authoring and coordinating final submission to HUD.







## Experience

Atria Planning is a woman-owned LLC located in downtown San Diego. Both Principals have the required hours available to commit fully to this project to complete the scope of work in accordance with the proposed timeline. Ms. Rothenberg will serve as the Project Manager and Ms. Colopinto will serve as Principal Researcher. Mr. Poche will lead all GIS analysis.



*Rebecca Rothenberg, AICP*

Ms. Rothenberg is a certified urban planner with a background in community revitalization, economic development strategies, market analysis, needs assessments, and affordable housing policy and finance. She has managed more than 30 projects, working with States, counties, cities and neighborhoods to assess market conditions and strategize for new investments in housing and commercial development. This includes providing technical assistance for four years to the Louisiana Housing Finance Agency for their housing needs, market analysis, rent studies, policy development for their QAP, and authoring their Strategic Plan.

She has also worked extensively with Public Housing, both as a consultant and as an employee. She served as Special Advisor to the Director of Real Estate at the Housing Authority of New Orleans (HANO) during the rebuilding of the “Big 4”, a redevelopment initiative for more than 1,000 housing units over a 4-year period. In this capacity, she led the research and drafted the Agency’s Strategic Plan, and co-authored and managed New Orleans’ Choice Neighborhoods Implementation Grant.

After working at HANO, Ms. Rothenberg consulted with public housing agencies, including the Puerto Rico Housing Administration, where she led the research and authored a final report identifying market conditions and areas of opportunity for approximately 380 public housing sites as part of their Strategic Plan. She is currently

assisting the Housing Authority of the City of Shreveport with their Choice Neighborhoods Planning and Action Grant.

In addition to her Public Housing work, Ms. Rothenberg has conducted and authored Unmet Needs Assessments for the State of New York, State of New Jersey, and State of Pennsylvania, drafted market analyses, fiscal impact analyses, neighborhood revitalization plans, Housing Plans and FMR/Rent Comparability studies.

In the past year, she has assisted ICF International in providing technical assistance for the HUD Choice Neighborhoods Program on behalf of HUD; provided technical assistance for financial and programmatic reporting for CDBG-DR for Pennsylvania and New Jersey; and drafted the Housing Strategies for Oregon’s NDRC application.

Prior to her position with Atria, she served as Planning Director for GCR Inc., a consulting firm in Louisiana. In this capacity, she served as chief researcher and principal author for several market analyses, housing studies and needs assessments.

Ms. Rothenberg was a Housing Expert for Mayor Landrieu’s Housing Task Force in New Orleans and served as a guest lecturer in market analysis at Tulane University’s Sustainable Real Estate Program.

### Selected Project Management Experience

- **City of Shreveport Choice Neighborhoods Implementation Plan and Planning and Action Grant**  
Housing Authority of the City of Shreveport, February 2016 to present
- **State of Pennsylvania Unmet Needs Assessment for CDBG-DR Action Plan**  
Pennsylvania Department of Community and Economic Development, 10/2015 to 9/2016
- **New York Unmet Needs Assessment and Analytics Support for Superstorm Sandy CDBG-DR Action Plan**  
New York Governor’s Office of Storm Recovery, 10/2013 – 10/2014





- **Delaware Housing Needs Assessment, 2015 - 2020**  
Delaware Housing Authority, 7/2013 – 10/2014
- **Puerto Rico Public Housing Redevelopment Plan - Neighborhood Assessment and Market Analysis**  
HUD, 2/2013 – 6/2014 (sub-consultant to CVR & Associates)
- **CDBG Grant Administration for Multi-Family Development**  
Terrebonne Parish Consolidated Government, 6/2012- 6/2014
- **Paul Maillard Road Sustainable Communities Plan – Economic Development, Housing and Implementation**  
St. Charles Parish, 11/2012 - 5/2013 (sub-consultant to Burk-Kleinpeter)
- **Unmet Needs Assessment for Housing, Economy and Infrastructure; Analytic Support for Superstorm Sandy CDBG-DR Action Plan**  
State of New Jersey, 2/2013 – 5/2013 (sub-consultant to CDM Smith)
- **Shreveport Revitalization Plan for Six Targeted Neighborhoods**  
City of Shreveport Office of Community Development, 2/2012 – 12/2012
- **Alexandria Master Plan – Housing Component**  
City of Alexandria, 5/2012 – 5/2013 (sub-consultant to Concordia Planning)
- **Iberville Public Housing Transformation Initiative, Housing and Measurable Outcomes**  
Housing Authority of New Orleans, 11/2010 – 5/2012
- **Scattered Sites Portfolio Redevelopment and Disposition Plan**  
Housing Authority of New Orleans, 11/2010 – 5/2012
- **Strategic Plan and Implementation Plan for Real Estate Development**  
Housing Authority of New Orleans, 11/2010 – 5/2012
- **Needs Assessment for Section 8 and Program Design for Tenant-Landlord Web-Based Application**  
Housing Authority of New Orleans, 7/2010 – 11/2010
- **Statewide Housing Needs Assessment**  
Louisiana Housing Finance Agency, 2006, 2008 and 2010
- **Market Study for New Orleans Housing Needs**  
Louisiana Office of Community Development, 3/2010 – 12/2010 (partnership with the University of New Orleans)
- **Road Home Piggyback Program Market Analysis, FMR Study and Rent Reasonableness**  
Louisiana Office of Community Development, 6/2009 - 12/2010 (sub-consultant to The Compass Group)
- **Feasibility Study for Commercial, Residential and Retail Development**  
Iberville Parish, 6/2008 – 1/2009
- **Market Feasibility Analysis for Housing and Commercial Growth**  
City of Central, 5/2008 – 12/2008
- **Agency 10-Year Strategic Plan**  
Louisiana Housing Finance Agency, 10/2006-3/2007
- **Workforce Housing Study**  
Habitat for Humanity St. Tammany, 1/2007 - 6/2007
- **Market Study for Modular Housing Post-Hurricane Katrina**  
Unity Homes Development, 11/2006 – 12/2007

### Education & Certifications

- Masters in Urban and Regional Planning, 2006  
University of Pennsylvania
- B.A., History, 2001  
University of Minnesota



### *Kimberly Colopinto*

Kim Colopinto is an urban planner and economist with over 10 years of experience conducting quantitative and qualitative policy research, economic impact studies, affordable housing analysis, and land market analysis. Her area of expertise is working with complex economic and demographic datasets, data visualization, and spatial analytics.

With the Montgomery County, Maryland Planning Department, Kimberly was a Senior Research Planner providing analysis and advice to master planning teams and policymakers. In this position, she developed several analytical tools to assess employment generation, retail demand, and housing need in the County that are now incorporated into standard procedure for sector and master plans.

Ms. Colopinto worked with GCR Incorporated to estimate unmet housing and economic development needs after Superstorm Sandy for the New Jersey Department of Community Affairs and the New York Governor's Office of Storm Recovery. In both cases, the analysis was used to prepare their Disaster Recovery Action Plan, as required by HUD for disbursement of CDBG funds. She has also conducted a statewide assessment of post-hurricane Katrina and Rita affordable housing needs with GCR & Associates for the Louisiana Housing Finance Agency.

Prior to this, Kimberly was a consultant with RCLCO and BAE Urban Economics, where she conducted market analysis, strategic planning and economic impact analysis of large real estate development projects, master plans, and affordable housing development. She also worked with the World Bank's Urban and Local Government Unit where she provided research in the areas of local economic development and land use policy across the globe.

### Selected Project Experience

**Project:** **Analysis of Disaster Recovery for Indiana (March 2013 – December 2014)**

**Client:** Indiana Housing and Community Development Authority

**Description:** Ms. Colopinto and Ms. Rothenberg are working with the IHCD to assess the impact of their CDBG-DR disbursements in areas affected by a 2008 flood event. The team constructed a series of metrics using GIS to assess recovery at the census tract-level and determine areas that are still in need. The analysis will help IHCD in allocating remaining CDBG-DR funds and future programming.

**Project:** **Supply and Demand Assessment of Childcare Facilities (March 2013 – December 2014)**

**Client:** The World Bank & Turkish Ministry of Education

**Description:** Ms. Colopinto conducted a neighborhood-level assessment of childcare facility supply and demand in Turkey. Ms. Colopinto used GIS to analyze existing daycare and nursery schools in relation to the child population and results from an extensive survey. The study has informed policy decisions regarding daycare and nursery school building regulations.

**Project:** **Paul Maillard Corridor Market Study (March 2013 – November 2013)**

**Client:** St. Charles Parish, Louisiana

**Description:** Ms. Colopinto conducted a market opportunity analysis for residential and commercial uses along the 3-mile Paul Maillard Road Corridor in Luling, Louisiana. Ms. Colopinto developed strategies for the community to promote sustainability through streetscape improvements, building regulations, and new development.

**Project:** **Delaware Housing Needs Assessment (March 2013 – February 2014)**

**Client:** Delaware State Housing Authority

**Description:** As the lead research analyst, she was responsible for modeling projected housing demand for 6 geographic regions of Delaware and contributing to a statewide assessment of Delaware's housing. Ms. Colopinto worked with a GIS team to





construct a Microsoft SQL Server database of demographic and economic data that was used to generate an online interactive mapping system.

**Project:** Superstorm Sandy Recovery (March 2013 – May 2013)

**Client:** NJ Department of Community Affairs

**Description:** Ms. Colopinto conducted data analysis for the CDBG Action Plan following Hurricane Sandy. As part of the analysis, she developed and a statistical model to geographically estimate unmet housing need using FEMA Individual Assistance records, Census Data, and insurance information. The analysis informs disaster recovery programs and policies laid out in the Action Plan.

**Project:** Affordable Rental Housing Study (January 2012 – March 2013)

**Employer:** M-NCPPC, Montgomery County Planning Department

**Description:** Ms. Colopinto developed a methodology to assess the impact that zoning density changes will have on existing market affordable rental housing in Montgomery County, Maryland. The analysis is now a standard component of master and sector plans and serve to ensure that planners make decisions that encourage and preserve affordable housing. Ms. Colopinto conducted and presented this analysis for the Glenmont Sector Plan, Long Branch Sector Plan, and White Oak Master Plan.

**Project:** Buckingham Village Market Analysis

**Client:** Arlington County, Virginia

**Description:** Ms. Colopinto conducted a market analysis of the Buckingham Village apartment complex in Arlington, Virginia with BAE Urban Economics. The analysis was used to identify market demand for condominiums and rental affordable housing in the Washington DC metro area.

**Project:** Global Housing Policy Indicators (July 2010 – January 2012)

**Client:** Habitat for Humanity International

**Description:** Ms. Colopinto worked with HFHI to develop a program to evaluate housing policy in urban areas using a set of standard indicators. To date, the Global Housing Policy Indicators

are collected in over twenty cities across the globe. Ms. Colopinto worked with HFHI to develop a marketing plan and an interactive website to display the indicators, [www.globalhousingindicators.org](http://www.globalhousingindicators.org).

## Education & Certifications

- Masters in Urban and Regional Planning, 2006  
University of Pennsylvania
- B.A., Political Science, 2002  
University of Pennsylvania

## *Richard Poché, GISP, ASLA*

Mr. Poché has over 20 years of GIS management experience and has worked on a wide array of GIS projects, demographic analysis and custom data visualizations.

## Technical Skills

ArcGIS Desktop 10.5 / ArcGIS Pro 1.4  
ArcGIS Online and Server  
QGIS 2.18  
SQL Server 2016 / PostGIS 2.3  
Tableau / Microsoft Power BI

## Education & Certifications

Bachelor of Landscape Architecture, 1995, Louisiana State University  
Certified GIS Professional (GISP) 2007  
Licensed Landscape Architect, Louisiana 02-0482, 2000  
ESRI Special Achievement in GIS (SAG) Award Winner, 2012



## Project Approach and Methodology

We have reviewed the background materials and preliminary ACS data regarding Maricopa (demographics, housing, socio-economics) and believe we have a solid understanding of what the community hopes to accomplish with this study. Following is our general approach to this project, with more details provided in the Project Approach section.

- 1. Projections of housing demand over the next ten years.** We have developed housing demand models for numerous government clients that take into account population changes, change in household sizes and types, age of householders, familial status, and housing preferences for different generations (including Baby Boomers and Millennials).
- 2. A better understanding of the gap between housing costs and what is affordable to local workers.** We understand the difference between housing demand (based on changes in the number of households) and housing needs (based on households that are cost-burdened, or living in overcrowded or unsanitary conditions). We emphasize the latter using CHAS data and housing conditions surveys. We also review average incomes by job classification (like food server, janitor, pre-school teacher, etc.), and assess housing affordability for those positions. This clearly illustrates housing needs in a way that most people understand.
- 3. The landscape of the homeownership and rental markets a decade after the housing market collapse, and what that means for potential first time buyers and working families.** From our past studies, we have seen a shift towards smaller homes, and a longer waiting period for would-be homebuyers to enter the homeownership market despite lower interest rates. We have also seen an increase in renters overall, both in the 20-30 year age range, and among 30-45 year olds who lost equity a decade ago, potentially lost their homes, and are hesitant to re-enter the homeownership market. We will see how these trends have changed the demand for various housing types.
- 4. A description of housing needs and housing demands in a regional context, with an understanding of job centers, migration patterns, and how pricing dictates land use.** We will develop the housing demand model in a regional context, understanding that families have opportunities to move within a region given various housing choices and prices. Therefore, the housing demand model will illustrate regional growth, and the portion of that growth that Maricopa can expect to absorb.
- 5. A better understanding of the disparity between wealthy residents and the workers who serve them.** When we worked in Delaware and New Orleans, we clearly saw how wealthy retirees are great for local and state economies, but oftentimes this benefit is not carried on to the workers in these industries. Service workers are typically the lowest paid workers, but are in high-demand within wealthier communities. We will include a detailed analysis of this relationship within Maricopa, with a particular emphasis on jobs that fuel economic development.
- 6. An analysis of the regulatory, financial, and political barriers to future development by housing types, including zoning, cost of development, and citizen involvement.** Oftentimes developers are unable to provide communities with the housing needed to meet existing and future needs because of zoning barriers, cost of development, NIMBYism, available land, or other costs of doing business. We will examine what regulatory, financial and political barriers exist that prevent developers from increasing the supply of new, quality workforce housing.
- 7. Strategies for increasing the supply of workforce housing (rental and homeownership) under the current financial and political climate.** We probably stand apart from our competitors in that we work with governments to develop policies and programs for housing development. We know real estate finance, including LIHTC, public housing programs, CDBG and HOME, historic and new market tax credits, and PPPs. We can assist Maricopa in moving towards implementation.





8. **The project must be clear, compelling, and can shape policy.** We have worked in cities and states where stakeholders have a clear idea of what is and isn't needed for their communities, based on their beliefs rather than hard data. We are sensitive to these voices, and can carefully and openly communicate the data in a way that resonates with opposition. We do this through carefully crafted language, illustrating best practices used in successful model communities, and conveying the facts in a personal way by speaking of individuals, workers, and family types, rather than simply income brackets. And we begin the conversation early on, so that stakeholders are thinking about the critical questions, rather than being "force fed" policy recommendations. Oftentimes, with this approach, they come to their own conclusions in line with final recommendations.



IMAGE 1 MEETING FACILITATION FOR SHREVEPORT'S HUD CHOICE NEIGHBORHOODS GRANT

## Scope of Work

This section will outline specific data sources Atria intends to use to conduct the analysis. It also outlines specific activities that Atria intends to complete throughout the life of the project.

### Project Kickoff

In the first week, Atria will develop a project work plan, communications protocol, and detailed outline of the methodology that will be used for the study. This will include the following:

- Data sources and list of indicators used to housing needs and housing demand
- Geography of analysis (likely the Census Tract) and method for "aggregating up" to the zip code
- Survey tools and expected outcomes (including the windshield survey, resident survey, interviews and focus group meetings)
- Timeline for public meetings and regular check-ins

Because this is a short turnaround project of four months, we will work with Maricopa staff to finalize the approach immediately.

### Assess Community Demographics and Housing Profile

To begin the project, Atria will collect and analyze critical data available through the American Community Survey for 2010 and 2015 to provide the groundwork for the needs assessment. This includes information on households, demographics, housing statistics, employment, income statistics, and other relevant data points specific to special needs.

This information will be augmented with ESRI Business Analyst's community profile tapestry data, population forecasts, and several of HUD's data tools regarding housing conditions, markets and trends. Additionally, we will collect information at the regional and state level to provide benchmarks for comparison.



Following are a few key features we use to understand basic demographics and local economic conditions:

- Changes in the number of households and type of households (seniors, people living alone, married without children, etc.)
- Changes in the housing market over time (total units by tenure, value, vacancy, HMDA information)
- Examination of housing types and age, in comparison with other model and comparable cities
- Migration patterns and spatial mismatch (where to workers live and work, and is there substantial commuting) using IRS data
- Understanding the population with mobility issues, disability, on social security or supplemental security
- Identifying what subsidized housing exists in the community relative to regional supply

	Elderly Family	Small Family/No Elderly	Large Family	Elderly Non-Family	Other Non-Family/No Elderly	Total
Renters	3,866	38,124	5,783	10,442	29,353	87,568
As % of All Households	1%	11%	2%	3%	9%	26%
Owners	43,888	113,898	19,101	29,816	37,284	243,987
As % of All Households	13%	34%	6%	9%	11%	74%
Renters and Owners	47,754	152,022	24,884	40,258	66,637	331,555
As % of All Households	14%	46%	8%	12%	20%	100%

Source: HUD Comprehensive Housing Affordability Strategy, 2006-2010

### Housing Conditions Survey

During our first visit to Maricopa, Atria will conduct a “windshield” survey of housing conditions. The survey can be considered an in-depth site visit where we will identify general housing conditions, distance to amenities from different neighborhoods, concentrations of homes in poorer condition, and generally to understand the layout

of Maricopa and any challenges it faces beyond the data. We will work closely with the City to identify parcels appropriate for mixed use and multi-family development.

### Housing Needs

Atria will use HUD CHAS data to understand the presence and location of households who are cost-burdened, severely cost-burdened, or living in overcrowded or substandard conditions by household income, household type, disability, and race/ethnicity.

This will include an analysis of the data at the Census Tract level, and summary data for the City. We will convey the information in comparison with national and regional trends, to illustrate where there are disproportionate housing needs.

Of particular note, we will also include a discussion of how the data conveys the housing needs of people who currently live in the community. Oftentimes, wealthier communities do not illustrate substantial housing needs because lower income families cannot afford to live in the community. This is misleading if we examine housing needs of workers. This component of the study will directly tie into the Workforce Housing Needs component.

### Housing Demand

Atria understands that housing needs and housing demand are two very different animals. Housing needs discuss affordability issues of current households who occupy a home; housing demand focuses on how many new units are needed to meet future growth.

Atria will present a clear analysis of housing demand and discuss these differences in the presentation and the report. We have an existing model for forecasting housing demand, which we will review with Maricopa and adjust as needed. It follows industry best practices, adjusting for existing supply, obsolescence rates, and demand types by tenure, size and price point. The model will include the following:

- Locally sourced regional population projections will be used alongside other demographic and economic indicators to project future housing demand.





- Cost profiles related to purchasing, renting, or maintaining housing will be developed to understand how much house existing and future households can afford.
- Atria will develop growth scenarios estimating the amount of the region's future growth that can be expected to occur in Maricopa.
- Projected demand will be estimated by household type including families, seniors, students, young professionals, immigrants, and empty nesters.

A key factor in determining the housing demand model will be the qualitative component of understanding and incorporating recent trends into recommended unit types. We will use ESRI's tapestry profile, which categorizes demand by household types, and support this with national survey data available through academic studies and industry trade groups. Specifically, we see the following trends that will influence the demand model:

- Many younger households are waiting longer to buy, preferring mobility and flexibility over long-term homeownership.
- Walkable communities require higher densities to support neighborhood retail and restaurants. This is becoming increasingly important to educated retirees and Millennials.
- We are still seeing a higher percentage of renters than the last 20 years due to the recession and housing market collapse. This is expected to continue, albeit at a slower rate.
- Communities are being proactive in incorporating Fair Housing goals into their policies and plans in a way that suits their communities, rather than waiting to be "flagged" and have requirements mandated.

### Mapping/GIS

Atria's GIS capabilities include ArcGIS, SQL platforms, and ESRI best practices. We have used mapping as a way to analyze data, and report data that is visually stimulating and meaningful. We will use GIS to convey demographic trends, housing conditions, parcel-

level information regarding zoning and land use, and identify areas with redevelopment potential.

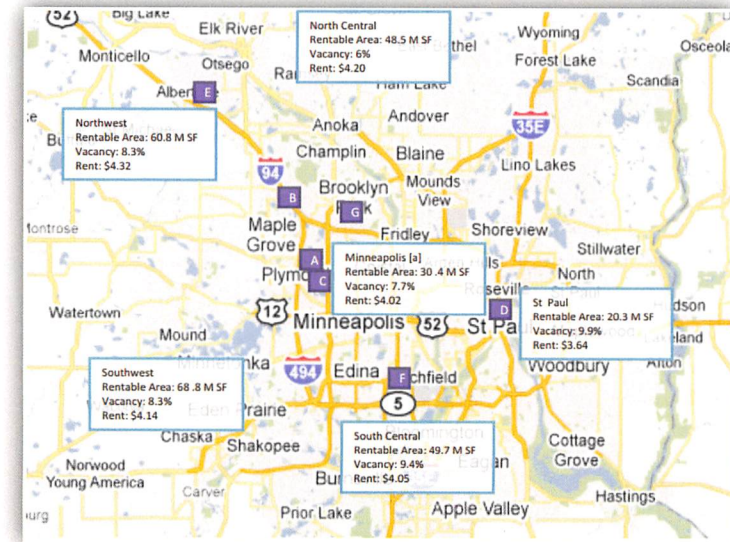


FIGURE 3 RENTS AND VACANCY RATES IN MINNEAPOLIS BY SUB-MARKET

### Surveys

Atria proposes four (4) types of surveys to support this study and recommended Action Plan. This is subject to revision based on feedback from Maricopa.

- Windshield survey of housing conditions and areas of opportunity for future development
- Resident survey through an interactive online survey tool
- Interviews with local employers and employees

- Focus group meetings with smaller groups, including seniors, special needs and younger adults.

The results of these surveys will impact the final recommendations of the report, specifically the workforce housing needs component and need for diverse housing types.

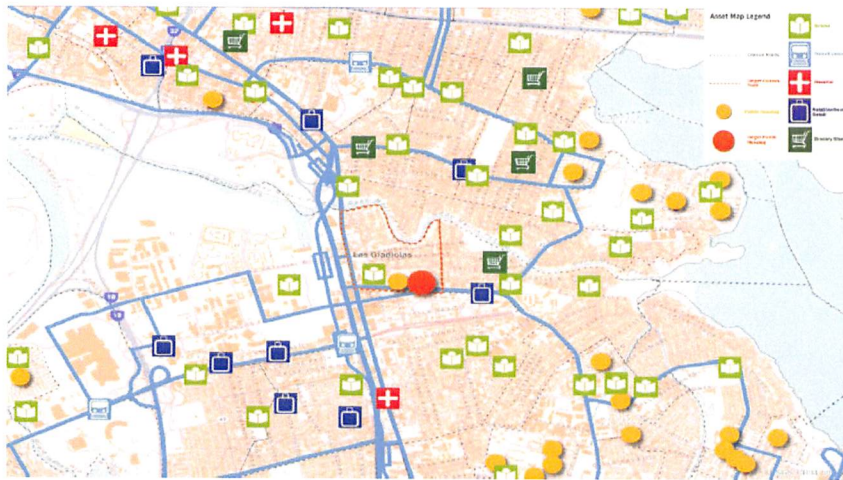


FIGURE 4 MAP OF NEIGHBORHOOD ASSETS FOR THE PUERTO RICO HOUSING ADMINISTRATION, INCLUDING CLINICS, GROCERY STORES, TRANSPORTATION LINES, AND SCHOOLS

### Workforce Housing Needs

Atria will develop an analysis of workforce housing needs by examining local and regional employment. The Bureau of Labor Statistics QCEW data will be used to analyze employment and wage trends and growth industries Maricopa and the region.

We will categorize jobs by which jobs are expected to increase in demand over the next ten years, and the housing needs and affordability of these jobs.

Job growth will focus on regional trends, assuming Maricopa would like to absorb some of this growth as a means of growing the local economy. As one element of this approach, we will include a

qualitative assessment of “quality of life” indicators that can attract employers. This will use the results of the employer survey and current studies on employer attraction and retention.

We will also include an Economic Base Analysis, including the Location Quotient technique, will be used to identify the employment strengths and industry concentrations in the community as compared to the greater region.

We will include HUD’s Transportation and Housing Affordability Index to understand if employees in or near the community can afford to live in community.

Finally, we will illustrate the gaps in affordability and supply based on consumer preferences and incomes of top occupations. We present this information in a clear and meaningful way so that residents can understand what affordability means for the cashier, the policeman, and the salon worker.



### Review Land Use, Policies, and Existing Programs

Atria stands out in our ability to translate housing needs data into recommendations. Most housing market analysts have not implemented housing programs or changed local regulations. We





have. We have and continue to provide technical advisory services for CDBG, LIHTC, Public Housing, and HCV programs to state and local jurisdictions. Also, as planners and GIS specialists, we understand how FAR, land use regulations, and permitting requirements can influence affordability. We will combine this knowledge and GIS expertise into a clear summary of the Constraints and Opportunities to diversify the housing stock in Maricopa.

### Preliminary Presentation and Workshop

Once we have completed the analysis of housing needs, housing demand, the four surveys (windshield, resident, employer, and focus groups), and the review of existing constraints, Atria will conduct two public meetings. The first will be a review of the existing data as a presentation. The second meeting will be a workshop with stakeholders, where we garner feedback on the goals, objectives and strategies in an interactive, planning format. Atria will devise the final schedule and outline of these meetings with Maricopa staff at kickoff.

### Goals, Objectives, Strategies, and Action Items

Atria will use the outcomes of the housing needs assessment and the Workshop recommendations to develop an Action Plan for addressing housing needs. This will include a SWOT Analysis, list of goals and objectives, the strategies for meeting these goals, and the Action Items to implement strategies.

This component will include critical milestones, likely responsible parties, and an outline of what is and isn't controlled by Maricopa. This component of the scope of work is more flexible than other deliverables, since it requires buy-in from Maricopa and its stakeholders. Atria will finalize this deliverable once we have the opportunity to discuss the roles of the City and any committees that will be engaged in the project.

### Recommendations

Using the information from the housing needs assessment, Atria will develop recommended policies and implementation measures. In particular, Atria will focus on the following:

- How to develop housing that is inclusive of various socio-economic backgrounds in a manner that supports community health and retains its character;
- Identifying any existing regulatory barriers to affordable housing;
- Strategies for increasing housing opportunities for local workers in coordination with employers and private developers;
- How to package incentives, identify partnerships, and use available State and federal resources to encourage private and public/private housing development.

### Final Report

Atria will draft a final report that includes the Needs Assessment, summary of engagement, results of surveys, and final Action Plan. Atria will first submit an outline presentation for review before drafting the final document. Maricopa will have the opportunity to review the presentation and the draft report, before Atria finalizes the report. Atria will provide Maricopa with five (5) bound copies of the final report, along with a presentation, and all of the data used for the work organized in an Excel and/or Access workbook. We will incorporate rich graphics, and present the information in a straightforward and easy-to-understand writing style. For a good example of our presentation style, see the following, where Rebecca Rothenberg served as Project Manager, chief author and researcher: [http://www.centralgov.com/assets/CityClerk/Feasibility/Market Presentation BW.pdf](http://www.centralgov.com/assets/CityClerk/Feasibility/Market_Presentation_BW.pdf)

and



[http://www.destatehousing.com/FormsAndInformation/Publications/2014\\_housing\\_needs\\_executive\\_web.pdf](http://www.destatehousing.com/FormsAndInformation/Publications/2014_housing_needs_executive_web.pdf)

### *Instruments & Data Sources*

We work with several data programs to analyze and present information. This includes ArcGIS for mapping services, Microsoft Access for database management, Excel for projections and modeling, PowerPoint or Prezi presentations, and Adobe Illustrator and InDesign to develop clear, easy-to-understand representations of critical data in charts and infographic presentations.

We believe it is important that the data collection and analysis is usable to the client and any future contractors. For this reason, Atria Planning will provide Maricopa with all of the data collected and analyzed in a user-friendly format, along with data dictionaries and methodology descriptions that clearly describe the field names, calculations, data sources, and effective dates for all data.







# Budget

TASK	SUBTASK	HOURS	COST	TASK	SUBTASK	HOURS	COST
<b>Project Management</b>		<b>24</b>	<b>\$ 3,000</b>	<b>Surveys</b>		<b>32</b>	<b>\$ 4,000</b>
	Kickoff	4	\$ 500		Resident Online Questionnaire	16	\$ 2,000
	Workplan	4	\$ 500		Employer/Employee Interviews	8	\$ 1,000
	Weekly Check-In	16	\$ 2,000		Focus Groups for Seniors, Millennials	8	\$ 1,000
<b>Assess Community Demographics and Housing Profile</b>		<b>44</b>	<b>\$ 5,500</b>	<b>Workforce Housing Needs</b>		<b>32</b>	<b>\$ 4,000</b>
	Demographic Characteristics	12	\$ 1,500		Worker Salary Affordability Index	8	\$ 1,000
	Population Trends	4	\$ 500		Barriers to Development Workforce Housing	16	\$ 2,000
	Household Characteristics	8	\$ 1,000		Housing Typology Needs	8	\$ 1,000
	Housing Stock	8	\$ 1,000	<b>Housing Goals, Objectives, Strategies, and Action</b>		<b>32</b>	<b>\$ 4,000</b>
	Housing Market Overview	12	\$ 1,500		Recap of Projected Housing Demand / narrative description	4	\$ 500
<b>Mapping/GIS</b>		<b>48</b>	<b>\$ 6,000</b>		Identify needed programs and responsible agencies	8	\$ 1,000
	Land Use, Zoning, Redevelopment Areas, and Aerial Photos	16	\$ 2,000		Housing and Transportation Affordability Index	4	\$ 500
	Provide Assessor Data and Parcel Maps	8	\$ 1,000		Recommendations for mitigating constraints	16	\$ 2,000
	Develop summary maps of the Demographics and Housing Profile	24	\$ 3,000	<b>Presentations and Final Report</b>		<b>84</b>	<b>\$ 10,500</b>
<b>Affordable Housing Needs</b>		<b>60</b>	<b>\$ 7,500</b>		Existing Conditions Assessment and Analysis to PM	4	\$ 500
	Windshield Survey	20	\$ 2,500		Community Meeting - Assessment and Analysis	8	\$ 1,000
	Analysis of CHAS data and existing housing needs	24	\$ 3,000		Community Meeting 2 - Final Assessment and Analysis	8	\$ 1,000
	Projected Housing Demand	16	\$ 2,000		Summary Report	16	\$ 2,000
<b>Review Land Use and Policy Documents</b>		<b>68</b>	<b>\$ 8,500</b>		Strategic Housing Plan	<b>40</b>	<b>\$ 5,000</b>
	Existing land use including parcel sizes, environmental, infrastructure	24	\$ 3,000		Strategic Housing Plan Presentation	8	\$ 1,000
	Feasibility of developable sites	16	\$ 2,000	<b>SUBTOTAL</b>			<b>\$ 53,000</b>
	Analysis of Zoning for diverse housing options and special needs	8	\$ 1,000	Plus Expenses			\$ 2,610
	Identify Constraints (governmental and non governmental)	16	\$ 2,000	<b>TOTAL</b>			<b>\$ 55,610</b>
	Minimum Density Calculations for affordability	4	\$ 500				





## References

1. Marlena Gibson  
Director of Policy and Planning  
Delaware State Housing Authority  
18 The Green  
Dover, DE 19901  
(302) 739 - 4263  
[Marlena@destatehousing.com](mailto:Marlena@destatehousing.com)

**Description of Work:** Housing Needs Assessment for the State of Delaware.

2. Joe Palus, Research and Innovation Director  
Indiana Housing and Community Development Authority  
30 South Meridian Street Suite 1000  
Indianapolis, IN 46204  
(317) 233-1813  
[jpalus@ihcda.IN.gov](mailto:jpalus@ihcda.IN.gov)

**Description of Work:** Disaster Impact and Unmet Needs Study for the State of Indiana regarding three flood events in 2008.

3. Milton Bailey, Former Executive Director  
Louisiana Housing Finance Agency  
Currently Director of Housing and Community Development,  
Frederick County, MD  
12 East Church Street  
Frederick, MD 21701  
(301) 600-3530

**Description of Work:** (1) Three housing needs assessments for the State of Louisiana; (2) Agency Strategic Plan; and (3) Technical Assistance for policy development, market analysis, and housing needs.

4. Bonnie Moore, Director of Community Development  
City of Shreveport  
401 Texas Street  
Shreveport, LA 71101  
(318) 673-5900  
[Bonnie.Moore@shreveportla.gov](mailto:Bonnie.Moore@shreveportla.gov)

**Description of Work:** Housing Needs Market Analysis, Revitalization Strategies, and Technical Assistance for HUD's Choice Neighborhoods redevelopment program.

5. Darrel Waire, Director of Housing and Human Services  
Terrebonne Parish Consolidated Government  
809 Barrow Street  
Houma, LA 70360  
[dwwaire@tpcg.org](mailto:dwwaire@tpcg.org)  
(985) 873-6798

**Description of Work:** Housing Needs Assessment and development of CDBG-DR Multi-Family Housing Program.

**COST SUMMARY/FEE SCHEDULE**  
**(ATTACHMENT A)**

In accordance to the specifications as described in this Request for Proposal document, we agree to provide the Housing Needs Assessment Study at the price(s) stated below:

Provide a firm fixed not-to-exceed price for all work/services described in the Scope of Services. The Offeror shall provide a detailed/itemized breakdown of proposed amount in table below. All fees should include, but not limited to: site visits, travel expenses, etc.

**FIRM FIXED NOT TO EXCEED AMOUNT**

**TOTAL PROJECT COST**    \$ 55,610.00

**Provide an itemized breakdown of the firm fixed not to exceed amount (NTE):**

Description of Consultant Position(s)/Service <small>(see Budget in Proposal for itemized list of tasks, hours, and costs)</small>	Hourly Rate
Program Manager and Principal Author	\$125
Chief Researcher	\$125
GIS and SQL Lead Technician	\$125

**COST:** In addition to staff time, it is anticipated that there will be additional costs associated with this FY 16/17 project.  
 \*If applicable, identify, define, explain, and estimate costs associated for outside professional help to conduct the study. The items evaluated (both recommended and not recommended) are explained as follows: The hourly rates should include fringe benefits, indirect costs, and profit. The Consultant's charge for reimbursable expenses should also be included. The consultant is asked to provide an estimated total project cost. The City of Maricopa has the option of negotiating a fee with the successful consultant, based upon costs for similar size projects recently managed by other Cities/Municipalities of scale within the state of Arizona.



**VENDOR QUESTIONNAIRE  
 (ATTACHMENT B)**

Name of Firm: Atria Planning LLC	
Years in Business providing similar services: 1.5	
License No(s) and Type: (Submit a copy with the proposal)	EIN 47-4948443 DUNS 085547749
Number of employees servicing this contract: 3	
<b>Verifiable References:</b> Include the name, contact person, address and telephone number of five (5) firms or government organizations for whom similar services have been provided. References must be current, and should be relevant to the required services. Provide description of services provided and dates of service.	
Firm/Government Agency Name: SEE REFERENCES IN ATTACHED PROPOSAL	
Contact Person:	Phone:
Address:	E-Mail Address:
Dates provided:	
Description of services provided:	
Firm/Government Agency Name:	
Contact Person:	Phone:
Address:	E-Mail Address:
Dollar value of work:	Dates provided:

Description of services provided:	
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Firm/Government Agency Name:	
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Contact Person:	Phone:
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Address:	E-Mail Address:
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Dollar value of work:	Dates provided:
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Description of services provided:	
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Firm/Government Agency Name:	
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Contact Person:	Phone:
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Address:	E-Mail Address:
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Dates provided:	
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Description of services provided:	
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Firm/Government Agency Name:	
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Contact Person:	Phone:
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Address:	E-Mail Address:
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Dates provided:	
-----------------	--

Description of services provided:	
-----------------------------------	--

<b>Subcontractors:</b> List subcontractor(s) that will participate in carrying out the obligations of any resulting contract.
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Subcontractor Contact Name:	Phone:
Subcontractor Address:	Email:
Category of Work:	
Contractor License Type:	Type/Number:
Subcontractor Contact Name:	Phone:
Subcontractor Address:	Email:
Category of Work:	
Contractor License Type:	Type/Number:
List any other information which may be helpful in determining your qualifications for this contract:	
<b>Debarment/Suspension Information:</b> Has firm or any of its principals been debarred or suspended from contracting with any public entity?: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes", provide in an attachment to this form the contact information for the public entity and state the reason for debarment or suspension, including the period of time for such debarment or suspension.	
<b>Does your firm accept electronic payments through:</b> Electronic Funds Transfer (EFT): <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Automated Clearing House (ACH): <input type="checkbox"/> Yes <input type="checkbox"/> No List any additional discounts that may result from paying electronically: _____ % Discount	
<b>Insurance:</b> Provide name of insurance carriers that provide coverage for your company.	
Automobile:	Hartford
General/Contractor Liability:	Hartford
Bonding:	NA

**SUBSTITUTE W-9 FORM**  
**ATTACHMENT C**

**PART I: Company Information:**

1. Name (as shown on Income Tax Return): Atria Planning LLC
2. Business Name (if different than above): \_\_\_\_\_
3. DUNS #: 085547749
4. Federal employer identification number (or SSN): 47-4948443
5. Type of organization (check one):
 

Individual/Sole Proprietor	Limited Liability Company* <input checked="" type="checkbox"/>
Corporation	<b>*Choose the tax classification</b>
Partnership	Disregarded Entity
Other: _____	Corporation
	Partnership
6. Order Address:
 

<u>875 G Street 505</u>	<u>San Diego, CA</u>	<u>92101</u>
(Order address)	(City)	(State) (Zip code)
7. Remittance address (if different than above):
 

_____	_____	_____
(Remittance address)	(City)	(State) (Zip code)
8. Contact person for bid invitations: Rebecca Rothenberg
9. Phone Number: 504-875-6012 Fax Number: \_\_\_\_\_
10. Email address of contact person: rrothenberg@atriaplanning.com
11. Applicant is a (check one):
 

Factory Representative	Jobber
Manufacturer	Authorized distributor
Retail dealer	Contractor
Consultant <input checked="" type="checkbox"/>	Other: _____
12. Indicate if the business is registered as a minority or woman-owned company.
 

Minority-owned	Woman-owned <input checked="" type="checkbox"/>	Not Applicable
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13. How long has the company been in business? 1.5 years
14. Does applicant currently hold a valid business license issued by the City of Maricopa?
 

Yes	No <input checked="" type="checkbox"/>
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**PART II: COMMODITY OR SERVICE DESCRIPTION**

1. Commodity/Service description (this section must be completed):  
Consulting services and research for housing needs



**PART III: APPLICANT TERMS AND CERTIFICATION**

**Terms:**

The City of Maricopa may take up to thirty (30) calendar days after the receipt of vendor's invoice to render payment unless other arrangements are made through a written contract. Applicant's signature below signifies acceptance of those terms.

**Under Penalties of perjury, I certify that:**

1. The number shown on this form is my correct federal employer identification number.
2. I am not subject to backup withholding because of failure to report interest and dividend income.
3. I am a U.S. person (including a U.S. resident alien).  
 (NOTE: You must cross out item 2. above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return).

4. The following business ownership classifications are applicable:  
 Disadvantaged Business Enterprise Ownership Classification (Select One Only):

"The Internal Revenue Service does not require your consent to any provision of this document other than the certifications

- |  |   |
|--|---|
| <input type="checkbox"/> 1 Non-Small/Non-Minority/Non-Disabled               | <input type="checkbox"/> 8 Small Business/Disabled Owner                    |
| <input type="checkbox"/> 2 Small Business (Per ARS §41-1001(20))             | <input type="checkbox"/> 9 Minority Woman Owned Business                    |
| <input type="checkbox"/> 3 Minority Owned Business [Per 15 CFR §1400.1(a)]   | <input type="checkbox"/> 10 Disabled-Minority Owned Business                |
| <input type="checkbox"/> 4 Woman Owned Business                              | <input type="checkbox"/> 11 Disabled-Woman Owned Business                   |
| <input type="checkbox"/> 5 Owned By Disabled Individual (Per ARS §41-1492.5) | <input type="checkbox"/> 12 Small Business/Minority-Woman Owned             |
| <input type="checkbox"/> 6 Small Business/Minority Owned                     | <input type="checkbox"/> 13 Small Business/Disabled-Minority Owned          |
| <input checked="" type="checkbox"/> 7 Small Business/Woman Owned             | <input type="checkbox"/> 14 Small Business/Disabled-Minority-Woman<br>Owned |

required to avoid backup withholding."

Rebecca Rothenberg \_\_\_\_\_

**Name** (Please print)

Principal \_\_\_\_\_

**Title** (Please print)

 \_\_\_\_\_


**Signature**

December 3, 2016 \_\_\_\_\_

**Date**

<b><u>INTERNAL USE ONLY</u></b>	
CC# _____	AUTHORIZATION: _____
FAX: _____	EMAIL: _____ PRINT: _____
REQUESTED BY: _____	

**ATTACHMENT D**  
**PARTICIPATION IF BOYCOTT OF ISRAEL**

	<b>Participation if Boycott of Israel</b>		State of Arizona State Procurement Office 100 N.15th Ave., Suite 201 Phoenix, AZ 85007
	Solicitation No.: RFP#17-FIN081016	PAGE 1	
	Description: Transaction Privilege Tax (TPT) Auditor Services for the City of Maricopa	OF 1	

All materials submitted as part of a response to a solicitation are subject to Arizona public records law and will be disclosed if there is an appropriate public records request at the time of or after the award of the contract. Recently legislation has been enacted to prohibit the state from contracting with companies currently engaged in a boycott of Israel. To ensure compliance with A.R.S. §35-393.01 This form must be completed and returned with the response to the solicitation and any supporting information to assist the State in making its determination of compliance.

As defined by A.R.S. §35-393.01:

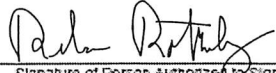
1. "Boycott" means engaging in a refusal to deal, terminating business activities or performing other actions that are intended to limit commercial relations with Israel or with persons or entities doing business in Israel or in territories controlled by Israel, if those actions are taken either:
  - (a) In compliance with or adherence to calls for a boycott of Israel other than those boycotts to which 50 United States Code section 4607(c) applies.
  - (b) In a manner that discriminates on the basis of nationality, national origin or religion and that is not based on a valid business reason.
2. "Company" means a sole proprietorship, organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, limited liability company or other entity or business association, and includes a wholly owned subsidiary, majority-owned subsidiary, parent company or affiliate.
3. "Direct holdings" means all publicly traded securities of a company that are held directly by the state treasurer or a retirement system in an actively managed account or fund in which the retirement system owns all shares or interests.
4. "Indirect holdings" means all securities of a company that are held in an account or fund, including a mutual fund, that is managed by one or more persons who are not employed by the state treasurer or a retirement system, if the state treasurer or retirement system owns shares or interests either:
  - (a) together with other investors that are not subject to this section.
  - (b) that are held in an index fund.
5. "Public entity" means this State, a political subdivision of this STATE or an agency, board, commission or department of this state or a political subdivision of this state.
6. "Public fund" means the state treasurer or a retirement system.
7. "Restricted companies" means companies that boycott Israel.
8. "Retirement system" means a retirement plan or system that is established by or pursuant to title 38.

All offerors must select one of the following:

- My company does not participate in, and agrees not to participate in during the term of the contract a boycott of Israel in accordance with A.R.S. §35-393.01. I understand that my entire response will become public record in accordance with A.A.C. R2-7-CS17.
- My company does participate in a boycott of Israel as defined by A.R.S. §35-393.01. :

By submitting this response, proposer agrees to indemnify and hold the State, its agents and employees, harmless from any claims or causes of action relating to the State's action based upon reliance on the above representations, including the payment of all costs and attorney fees incurred by the State in defending such an action.

Atria Planning LLC  
Company Name  
 875 G Street 505  
Address  
 San Diego, CA 92101  
City State Zip

  
Signature of Person Authorized to Sign  
 Rebecca Rothenberg  
Printed Name  
 Principal  
Title