

**Purchasing Summary**  
City of Maricopa  
Purchasing Office  
**DEVELOPMENT SERVICES HOUSING NEEDS ASSESSMENT STUDY**  
**“FIRST AMENDMENT”**

In accordance with City of Maricopa, Purchasing Code, Article IV, Section #3-215 it is recommended that Atria Planning, LLC is awarded a contract and utilized for the City of Maricopa, Arizona Housing Needs Assessment Study.

The City of Maricopa, Development Services Department reviewed and worked with the Purchasing Staff to develop specifications and solicit Request for Proposal #RFP17DS101422016. The RFP was competitively solicited and awarded to Atria Planning.

*On January, 17, 2017, The Mayor and City Council approved the contract between the City and Atria Planning, LLC, a California corporation located in San Diego to conduct a Housing Needs Study and Action Plan for the City of Maricopa.*

The First Amendment to Consultant Agreement (“First Amendment”) shall be revised to include developing a Housing Plan, as more specifically set fourth in Exhibit 1, which is attached in hereto and incorporated herein by reference (“Services”).

Cost of “First Amendment”: \$44,694.00

Please note: On July 18, 2017, the Mayor and City Council shall discuss and possibly take action on approving “Amendment 1” to the Contract between the City and Atria Planning, LLC; previously approved on January 17, 2017.



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Matt Bellin  
Purchasing Coordinator  
July 11, 2017

**Please see pages 2 & 3 for Exhibit 1**

Scope of Services – Housing Plan for Maricopa  
Addendum to Contract # RFP #17-DS101422016

Task 1 – Work Session 1, General Strategies to Adoptable Strategies

Prepare for and facilitate a day-long work session with the Housing Steering Committee, where members discuss and collaboratively select the primary housing strategies based on goals and using the Strategies Tool Kit.

Deliverable(s): Strategies Toolkit; Agenda; Presentation; Notes; Vision/Goals/Strategies Report  
Date: August, day TBD

Task 2 – Development Scenarios for Two (2) Target Sites

Develop three (3) design and financing scenarios for two of the target sites identified for a town center and/or mixed use development, for a total of 6 scenarios.

Deliverable(s): Design renderings; Development Sources and Uses Scenarios; Summary Report  
Date: October 13

Task 3 – Community Meeting, Strategies and Visualization

Prepare for and facilitate a city-wide meeting to present the Vision, Goals, and Strategies, and vote on visualization/design preferences. This will include the design scenarios developed in Task 2 along with imagery of various design features and standards. (Note: cost proposal includes estimated costs for 100 voting devices)

Deliverable(s): Presentation; Preferences Survey; Agenda; Recording; Survey Results; Summary Report  
Date: October, day TBD

Task 4 – Work Session 2, Implementation Plan

Prepare for and facilitate a day-long work session with the Housing Steering Committee to develop a draft Implementation Plan, including roles, responsibilities, resources needed, and Action Items.

Deliverable(s): Agenda; Presentation; Notes; Implementation Plan  
Date: November, day TBD

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Task 5 – Tableau Interactive Data Portal

Develop an online, interactive web portal that displays demographic, economic, and housing data for Maricopa's Block Groups, Census Tracts, and city-wide data in comparison with county, MSA, state and US statistics. The portal will include an interactive mapping interface and export functionality to Excel.

Deliverable: Tableau Data Portal  
Date: September 21

Task 6 – Technical Assistance and Communications with Developers/Housing Agencies

Assist the City of Maricopa in pursuing and/or assisting developers score favorably in the State's Qualified Allocation Plan for LIHTC multi-family housing development. Assist the City as needed to develop partnerships and continue communication with developers, housing organizations, and other stakeholders as needed.

Deliverable: Summary Report for all activities under Task 6  
 Date: NA

Task 7 – Draft Request for Proposals/Developer Solicitation  
 Draft a template Request for Qualifications and/or Request for Proposals for the City to solicit development teams for mixed use development. The template will be a boilerplate version based on comparable city solicitations that Maricopa can edit/revise as needed.  
 Deliverable: Template RFP for Developer Solicitation  
 Date: November 10

Task 8 – Housing Plan  
 Write a draft and final Housing Plan that includes the Housing Needs Assessment, Vision, Goals, Strategies, Renderings, and Implementation Plan that can be adopted by the City.  
 Deliverable: Draft and Final Housing Plan  
 Date: January 2018, TBD

Task 9 – Final Presentation  
 Present the final housing plan twice (one to City Council) one site visit.  
 Deliverable: Draft and Final Presentation  
 Date: January 2018, TBD

Task	Task Description	Hours	Cost	Deliverable
1	Work Session: General Strategies to Implementation	24	\$3,000	Agenda, Minutes, Strategies Report
2	Develop scenarios for two (2) mixed use areas under three density/design schemes	120	\$15,000	Design documents, renderings, visualization; Financing and Development Scenarios in Excel; Summary Report
	a) Renderings and Design	80	\$10,000	
	b) Financing/Development Scenarios	40	\$5,000	
3	Community Meeting	40	\$3,000	Presentation; Preferences Survey; Recording; Results; Summary Report
4	Work Session: Implementation Plan	24	\$3,000	Agenda, Minutes, Implementation Plan
5	Tableau online data portal	80	\$10,000	online, interactive website displaying demographics, economic, and housing data
6	Communications with developers, State Housing Agency, and other technical	20	\$2,500	Summary report
7	Draft Request for Proposals for development	8	\$1,000	Draft RFP based on comparable projects
8	Final Housing Plan	16	\$2,000	Draft and Final Plan in Word and PDF
9	Final Presentation	8	\$1,000	Draft and Final Presentation in PowerPoint and PDF
	<b>TOTAL</b>	<b>340</b>	<b>\$40,500</b>	
<b>EXPENSES</b>	<b>5 site visits for a total of 14 days and 9 nights</b>			
	Lodging (\$124 including tax)		\$1,220	
	Car (\$65 including insurance)		\$910	
	Gas (4,000 miles estimate)		\$150	
	Per Diem (\$51)		\$714	
	Printing		\$700	
	Community meeting voting devices (\$5 each)		\$500	maximum 100 devices
	<b>TOTAL</b>		<b>\$4,194</b>	
<b>Grand Total</b>			<b>\$44,694</b>	