

# MUNICIPALITY OF ANCHORAGE



*Mayor Dan Sullivan*

Purchasing Department

June 23, 2010

## REQUEST FOR PROPOSAL

RFP 2010-P016

### CONSULTANT SERVICES TO CONDUCT A HOUSING MARKET ANALYSIS FOR THE MUNICIPALITY OF ANCHORAGE

The Municipality of Anchorage is requesting Proposals for the **Department of Neighborhoods**.

Enclosed is pertinent information for use in preparing your Proposal. This information will be used as a guide in the preparation of any subsequent contract.

**Proposals must be received** at the Purchasing Office, 632 W. 6th Avenue, Suite 520, Anchorage, Alaska 99501 (Mailing Address: PO Box 196650, 99519-6650), **prior to 5:00 P.M., Local Time, July 16, 2010**. Office hours are Monday through Friday, 8:00 a.m. - 12:00 p.m. and 1:00 p.m. - 5:00 p.m., excluding holidays. Time of receipt will be as determined by the Purchasing Office time stamp. Proposals received by the Purchasing Office after the time specified will be returned to the proposer unopened. **Facsimile or email or any other electronic media submittals will not be accepted.**

A non-mandatory meeting for discussion of the Proposal will be held at **3:00 P.M. Local Time, June 30, 2010**, in the Purchasing Office at the above address. A copy of the Request for Proposal may be obtained from the Purchasing Office at the above address. If you obtain a Request for Proposal from the Purchasing Office you will automatically receive any Addenda by mail.

An electronic (.pdf) copy of the Request for Proposal is available at Municipality of Anchorage, Purchasing Office's website; <http://www.muni.org/Departments/purchasing/Pages/bidding.aspx>. Should you choose to obtain a copy of the Request for Proposal from the website; it is your responsibility to periodically check the website for addenda.

For information about this solicitation contact me at (907) 343-4249, facsimile (907) 343-4595 or at our email address; [wwpur@muni.org](mailto:wwpur@muni.org). All correspondence should include the **RFP** number and title.

**Six (6) copies** of your Proposal must be submitted.

The Municipality of Anchorage reserves the right to reject any and all Proposals and to waive any informalities in procedures.

Sincerely,

Werner W. Waak  
Deputy Purchasing Officer

**REQUEST FOR PROPOSALS  
FOR CONSULTANT SERVICES  
TO CONDUCT A HOUSING MARKET ANALYSIS FOR  
THE MUNICIPALITY OF ANCHORAGE**

**DEPARTMENT OF NEIGHBORHOODS  
JUNE 2010**

# **REQUEST FOR PROPOSAL HOUSING MARKET ANALYSIS**

## **SECTION 1. GENERAL INFORMATION**

### **1.1 Purpose**

The Municipality of Anchorage (MOA) has received funding from the US Department of Energy through the Energy Efficiency and Conservation Block Grant program (EECBG) for this project. Accordingly, the successful proposer of this contract must comply with the provisions of the American Recovery and Reinvestment Act (ARRA) of 2009, Pub L. 11-5. The MOA has an approximate budget of \$150,000 to \$200,000 for completion of the tasks in this proposal.

The MOA, Department of Neighborhoods is soliciting proposals from qualified firms to conduct a housing market analysis for the Anchorage Bowl and Chugiak-Eagle River. This analysis will answer the following questions:

1. What are the current market demands and housing preferences in Anchorage, especially the demand for more compact housing types? What type of housing and neighborhood amenities do they desire? What are the demographics of households in these market segments?
2. Based on long term population projections, and considering current housing preferences and long-term trends that are likely to influence or change such housing preferences, what is the estimated future demand for various housing types in Anchorage over the next twenty years?
3. What is the estimated cost to develop various types of compact housing?
4. What are the most effective strategies that the Municipality might adopt to help improve the financial feasibility, eliminate barriers and otherwise facilitate development of various compact housing types?

### **1.2 Background**

Nationally, there has been a trend toward urban redevelopment. In order to capture property tax revenue, accommodate housing needs, and decrease the cost of infrastructure, many jurisdictions are investing in the redevelopment of their urban core. At the same time, with the rising cost of transportation many households are electing to locate closer to their jobs in lieu of commuting to the suburbs. Nationally, households are willing to pay the higher cost of housing if it is located close to their job and if the neighborhood provides other urban amenities including walkability, access to open space, and proximity to shopping and services.

Anchorage's Comprehensive Plan adopted in 2001 emphasizes that future growth must occur through infill/redevelopment in underutilized areas of town. A greater share of new housing will be attached housing types, at higher densities, located near existing commercial centers. Anchorage is updating its future land use plan for the long-term land supply, locations, and density of future housing development. This housing market analysis will answer questions regarding the projected demand for the main categories of compact housing within Anchorage.

### **1.3 Questions**

Any questions regarding this proposal are to be submitted in writing to:

Municipal Purchasing Officer  
632 W. Sixth Avenue, Suite 520  
P.O. Box 196650  
Anchorage, AK 99519-6650  
(907) 343-4590 Phone  
(907) 343-4595 Facsimile

Purchasing office hours are 8:00 a.m. to noon; 1:00 p.m. to 5:00 p.m. local time Monday through Friday.

### **1.4 Preparation Costs**

The Municipality shall not be responsible for proposal preparation costs, nor for attorney fees associated with any (administrative, judicial or otherwise) challenge to the determination of the highest ranked proposer and/or award of contract and/or rejection of proposal. By submitting a proposal each proposer agrees to be bound in this respect and waives all claims to such costs and fees.

## **SECTION 2. RULES GOVERNING COMPETITION**

### **2.1 Examination of Proposals**

Proposers should carefully examine the entire RFP and any addenda thereto, and all related materials and data referenced in the RFP. Proposers should become fully aware of the nature of the work and the conditions likely to be encountered in performing the work.

### **2.2 Proposal Acceptance Period**

Award of this proposal is anticipated to be announced within 30 calendar days, although all offers must be complete and irrevocable for 90 days following the submission date.

### **2.3 Confidentiality**

The content of all proposals will be kept confidential until the selection of the Contractor is announced. At that time, the selected proposal is open for review by the competing proposers, excluding any tabulations and evaluations thereof. After the award of the Contract, all proposals, tabulations and evaluations will then become public information except that proposers may mark samples of work done for other clients as confidential and request that the work samples be returned after a contract has been awarded and executed for this project.

### **2.4 Proposal Format**

Proposals are to be prepared in such a way as to provide a straight forward, concise delineation of the proposer's capabilities to satisfy the requirements of this RFP. Emphasis should be concentrated on: 1) conformance to the RFP instructions; 2) responsiveness to the RFP requirements; and 3) completeness and clarity of content.

## **2.5 Signature Requirements**

All proposals must be signed. A proposal may be signed: by an officer or other agent of a corporate vendor, if authorized to sign contracts on its behalf; a member of a partnership; an owner of a privately-owned vendor; or other agent if properly authorized by a power of attorney or equivalent document. The name and title of the individual(s) signing the proposal must be clearly shown immediately below the signature. Failure to provide a signed proposal will be grounds for rejection. A signed letter of transmittal will fulfill this requirement.

## **2.6 Proposal Submission**

One original plus five copies of the proposal must be received by the Purchasing Department prior to the date and time specified in the cover letter. All copies of the proposals must be under sealed cover and plainly marked. Proposals shall be delivered or mailed to:

Municipality of Anchorage  
Purchasing Department  
P.O. Box 196650 (Mailing Address)  
632 W. Sixth Avenue, Suite 520 (Physical Address)  
Anchorage, AK 99519-6650

## **2.7 Disposition of Proposals**

All materials submitted in response to this RFP will become the property of MOA.

## **2.9 Oral Change/Interpretation**

No oral change or interpretation of any provision contained in this RFP is valid whether issued at a pre-proposal conference or otherwise. Written addenda will be issued when changes, clarifications, or amendments to proposal documents are deemed necessary by MOA.

## **2.10 Modification/Withdrawal of Proposals**

Proposals may not be revised after they have been submitted. A firm may withdraw its proposal at any time prior to the final submission date by sending written notification of its withdrawal, signed by an agent authorized to represent the firm. The respondent may thereafter submit a new proposal prior to the final submission date. Modifications offered in any other manner, oral or written will not be considered. A final proposal cannot be changed or withdrawn after the time designated for receipt, except for modifications requested by the MOA after the date of receipt and following oral presentations.

## **2.11 Late Submissions**

PROPOSALS NOT RECEIVED PRIOR TO THE DATE AND TIME SPECIFIED IN THE COVER LETTER WILL NOT BE CONSIDERED AND WILL BE RETURNED UNOPENED AFTER RECOMMENDATION OF AWARD.

## **2.12 Rejection of Proposals**

MOA reserves the right to reject any or all proposals if determined to be in the best interest of MOA.

## **2.11 Disadvantaged/Woman Owned Business Enterprise (D/WBE) Goals**

This project is funded wholly or in part with financial assistance from the U.S. Department of Energy. It is subject to Anchorage Municipal Code Chapter 7.60, Anchorage Municipal Regulations 7.60, OMB Circular 102 and 24 CFR 85.36(e) regarding the use of small and minority firms and women's business enterprises and to any other applicable federal and state regulations. The requirements of this program are mandatory. Bidders and proposers shall be fully informed regarding the requirements of the above regulations.

A bidder or proposer who is not in compliance with the requirements of the applicable regulations or these specifications will not be awarded this contract. Noncompliance after award of contract constitutes a breach of the contract and may result in termination of the contract or other appropriate remedy for such breach.

No percentage goals based on race, ethnicity, or gender have been established for subcontracting on this project. However, all bidders and/or proposers on this project must take all necessary affirmative action steps to assure that minority firms and women's business enterprises are used when possible as sources of supplies, equipment, construction, and services. These affirmative action steps shall include:

1. Placing qualified small and minority businesses and women's business enterprises on solicitation lists;
2. Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;
3. Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority business, and women's business enterprises;
4. Establishing delivery schedules, where the requirements permit, which encourage participation by small and minority businesses, and women's business enterprises; and,
5. Using the services and assistance of the Small Business Administration, and the Minority Business Development Agency of the Department of Commerce.

## **SECTION 3. SCOPE OF WORK**

### **3.1 Tasks**

For this project, the successful proposer, hereinafter called the, “Contractor,” shall perform the following tasks:

#### **3.1.1 Housing Preference Survey**

The DoN is seeking qualified, experienced firms to prepare and conduct a Housing Preference Survey. The survey will address the following questions:

- What is the demand for more compact/urban housing (both rental and ownership) in Anchorage?
- Of those that would opt to live in a more compact/urban home, what housing type do they prefer (e.g., single family vs. townhome vs. apartment style)?
- What amenities do the households prefer (unit sizes, number of bedrooms/ bathrooms, garage size/parking spaces, project amenities, neighborhood amenities, access to transit)?
- What can these households afford? What are they will to pay?
- How far are people willing to commute to find desirable housing?

The survey methodology will be designed to produce a statistically representative sample of residents in the Municipality of Anchorage. This will require an initial definition of the geographic and demographic makeup of the residents, and then designing the survey process to ensure a representative sample is obtained of all significant groups in the area including:

- Different geographic areas (Anchorage Bowl, Eagle River)
- Different demographics (age, income, family size, ethnicity)
- Different tenure (owner, renters)

Tasks under this objective include:

- Compile basic information on the target population.
- Develop the most appropriate survey methodology and prepare survey questions with input from the Advisory Committee.
- Conduct surveys over the phone, internet, mail, or other method as determined.
- Compile and analyze the survey results.
- Share initial results with the Advisory Committee as described in 3.1.6.- Public Process.
- Prepare a draft document.
- Prepare a Final Housing Preference Survey with tables and charts and a summary

#### **3. 1. 2 Twenty-Year Housing Demand Projection**

Based on the results of the Housing Preference Survey, and long term regional population growth projections, the Contractor will forecast the potential demand over the next 20 years for various housing and neighborhood types. Tasks under this objective include:

- Receive and if necessary improve upon, population, household, income and demographic forecasts for Anchorage from the 2010 Census (if available), University of Alaska (ISER), municipal Planning Department and other sources the consultant may recommend.
- Identify and weigh long-term factors likely to influence future housing demand preferences, such as changing household demographics, incomes, construction costs, local and national tax policies,

lending policies at financial institutions, transportation and energy costs, changes in cultural/personal preferences regarding transportation and urban environments, public investments in transportation, urban amenities, or public safety.

- Develop appropriate methodology to project housing demand by housing type, such as small lot/cottage single-family, attached/townhouse, and multifamily. The methodology should be able show a trend in housing demand over the coming 20 years (either continuous or at 5- to 10- year intervals).
- Incorporate the housing preference survey results, adjusting for housing preference factors that are likely to change in the future.
- Share initial results of the housing demand projection with the advisory committee.
- If Census data is released during the performance of the contract, the consultant will update the Housing Demand Projection to include the relevant data.
- Prepare a draft and final document in the form of a white paper.
- Share initial results with the Advisory Committee as described in 3.1.6.- Public Process.
- Include the final draft in the Final Housing Market Analysis Report.

### **3.1.4. Housing Project Cost/Feasibility Analysis**

Redevelopment of urban areas adds many additional costs when compared to new development including higher land costs, upgrading of aging infrastructure, and remediation of environmental contamination. This analysis will assess the financial costs/feasibility of several types of compact housing development in Anchorage. Tasks under this objective are:

- With input from the Advisory Committee, select up to four specific housing project scenarios.
- For each housing project scenario, develop a pro forma for the construction of the project. For a rental project, this will include an operating budget.
- Identify which housing types or scenarios are likely to be feasible under current/estimated future market conditions, as well as those desirable housing types that may require either improvements in market conditions or public interventions to reduce development costs or otherwise improve development feasibility.
- Identify key factors that influence financial feasibility and/or contribute to costs, and key future trends which may affect those factors in the near and long term.
- Prepare a draft and final document in the form of a white paper.
- Share initial results with the Advisory Committee as described in 3.1.6.- Public Process.
- Include the final draft in the Final Housing Market Analysis Report.

### **3.1.5. Strategies to Facilitate Compact Housing Infill/Redevelopment**

The final portion of the analysis is intended to identify potentially effective strategies for the Municipality to help reduce the cost or otherwise assist in the financial feasibility of desired infill/redevelopment housing types. Such strategies may include incentives, tax policies, funding opportunities, partnerships, land assembly/site location or other tools.

- Compare available information about future housing supply capacity in the Anchorage Bowl and Chugiak-Eagle River to the housing demand forecast, by housing type. (Information on future land supply and housing capacity by housing type will be provided by the Municipality.)

- Identify housing types for which estimated future supply may be lacking or may depend on a lot of new infill/redevelopment construction, and that appear to need incentives or interventions in order to be cost feasible.
- Recommend municipal policies and strategies, which would help achieve an optimum supply of appropriate compact housing types, at the most appropriate locations, for the next twenty years.
- Prepare a draft and final document in the form of a white paper.
- Share initial results with the Advisory Committee as described in 3.1.6.- Public Process.
- Include the final draft in the Final Housing Market Analysis Report.

### **3.1.6. Public Process**

A ten person advisory committee made of MOA staff and community members with expertise in the housing market and real estate development will provide the consultant feedback through this process. On all tasks described above, the consultant will meet with the advisory committee to discuss the methodology and present the draft results. There will be up to six advisory committee meetings. For all meetings the consultant will be responsible for:

- Scheduling the meeting and notifying the committee members.
- Developing the agendas, facilitating discussions, and drafting minutes.
- Providing all materials.
- Collecting and responding to comments from the advisory committee.

## **3.2 Products**

The following is a list of the written products to be produced during the course of this project:

- Housing Preference Survey
- Twenty Year Housing Demand Projection White Paper
- Housing Cost/Financial Feasibility White Paper
- Strategies to Facilitate Compact Housing Infill/Redevelopment White Paper
- Final Housing Market Analysis Report- This document will include the results of all the previous documents into one document. It will include an executive summary and conclusion section.

For all products, the consultant will provide the final document as a PDF file. The White Papers will be technical papers with limited graphics. The Draft Housing Preference Survey and the Final Housing Market Analysis report will be full color reports for general public consumption that include images, graphics, charts, and tables. The Municipality will be able to cut and paste all graphics and images and text within all documents. The Contractor will provide the Municipality with 30 copies of all products. The copies provided of the Draft Housing Preference Survey and the Final Housing Market Analysis Report will be in full color.

Contractor shall meet with staff from the Municipality's Department of Neighborhoods at the beginning of this project and as needed to discuss project issues. Contractor shall discuss and review each draft document with staff from the Municipality's Department of Neighborhoods and the Advisory Committee and make revisions per review comments received before proceeding to produce the next deliverable product.

## **3.3 Presentations**

At the end of the project, the consultant will present the findings at one or several formal meetings: including to the HAND commission, the Planning and Zoning Commission, the administration, and the Assembly. The consultant will develop a PowerPoint presentation summarizing the results.

#### **SECTION 4. PROJECT SCHEDULE**

The Contractor selected for this project will be expected to begin work by August 1, 2010, and to complete all work by March 31, 2011.

#### **SECTION 5. PROPOSAL AND SUBMISSION REQUIREMENTS**

To achieve a uniform review process and obtain the maximum degree of comparability, it is required that the proposals be organized in the manner specified below. Proposals shall not exceed fifteen (15) pages in length (excluding letter of transmittal, resumes, title page(s), index/table of contents, attachments, or dividers.) Information in excess of those allowed will not be evaluated/scored. One page shall be interpreted as one side of single lined, typed, 8 1/2" X 11", piece of paper.

##### **5.1 Title Page**

Show the RFP number and subject, the name of your firm, address, telephone number(s), name of contact person, and date.

##### **5.2 Table of Contents**

Clearly identify the materials by section and page number.

##### **5.3 Letter of Transmittal**

Briefly state your firm's understanding of the services to be performed and make a positive commitment to provide the services as specified.

Give the name(s) of the person(s) who are authorized to make representations for your firm, their titles, addresses, and telephone numbers.

**The letter must be signed by a corporate officer or other individual who has the authority to bind the firm. Failure to provide a signed letter of transmittal will be grounds for proposal rejection.**

##### **5.4. Contents of Proposal**

###### **5.4.1 Experience in Designing, Conducting and Analyzing Surveys**

Proposers shall describe the firm(s') experience designing survey questions, conducting surveys, and survey analysis. Proposers shall provide references for the three most recently completed survey projects, listing a point of contact, telephone number, and brief description of the work completed for each reference. Proposers shall also attach to their submittals two survey reports prepared for other clients. (Samples will

be returned, if requested, after the proposal process has been concluded and a contract executed with the successful proposer.)

#### **5.4.2 Housing Market and Redevelopment Planning Experience**

Describe the firm(s') experience and knowledge regarding housing markets, real estate development, and redevelopment planning. Proposers shall provide references for the three most recently completed projects that included housing market analysis and/or redevelopment planning, listing a point of contact, telephone number, and a brief description of the work completed for each reference. Proposers shall also attach to their submittals two sample housing market analysis reports prepared for other clients. (Samples will be returned, if requested, after the proposal process has been concluded and a contract executed with the successful proposer.)

#### **5.4.3 Technical Expertise**

##### **A. GIS**

This project may involve working with GIS data. Describe the firms' experience working with data using ESRI's GIS and developing GIS maps. Describe the experience and qualifications of the staff or sub-consultants who would be working with the data sets and GIS maps.

##### **B. Statistical Analysis**

This project will involve statistical analysis of the housing survey results. Describe the statistical programs the firm has access to and the firm's experience working with statistical programs. Describe the experience and qualifications of the staff or sub-consultants who would be conducting the statistical analysis.

#### **5.4.4 Identification and Qualifications of Key Project Staff and Sub-Consultants**

All key personnel proposed to be assigned to the project shall be identified and their qualifications and experience shall be described in regards to survey methodology, statistical analysis, housing market analysis, real estate development, and redevelopment. Area(s) of responsibility of key personnel for the project and the level of their commitments shall be identified. Current resumes for each identified key person shall be provided.

#### **5.4.5 Methodology and Approach**

The proposer shall describe how the scope of work for each required task will be undertaken. In particular, proposer shall describe the resources and methods for each task. The methodology shall be described in sufficient detail to demonstrate the proposer's familiarity with survey methodology, housing market analysis, real estate development, and redevelopment.

#### **5.4.6 Management Plan**

A management plan shall be prepared which includes a description of how the proposer plans to carry out the project. At a minimum, the plan shall address:

- The firm(s') capacity for effective and efficient project management, including dependability and timeliness. Where more than one firm or organization is involved, the roles and responsibilities for each shall be clearly outlined.
- A staffing plan detailing project assignments by key personnel, together with an estimate of the hours required for each item of the proposed work plan.
- Policies and procedures to be utilized to ensure that high quality work is provided within project budget and timeline.
- The change order ratio for each of the last three projects completed by the consultant. The change order ratio will be the total dollar amount of change orders to the contract divided by the original dollar amount of the contract. Please submit three change order ratios, one ratio for each of the last three projects.

#### **5.4.7 Project Timeline**

In conjunction with the management plan, proposer shall prepare a timeline for project that assumes a contract start date of August 1, 2010, and a contract completion date of no later than March 31, 2011. The timeline shall indicate the estimated completion date for each task, each Advisory Committee meeting, all draft written products, and the target presentation dates for the final report.

Proposer must be able to affirmatively commit to completing the project by no later than March 31, 2011.

#### **5.4.8 Contractor Location**

A description of the firm(s') location where the primary services are to be provided, and the ability to meet with Municipal staff as needed during the performance of the contract.

#### **5.4.9 Fee Schedule**

Provide a fee schedule in the format included in this proposal in Appendix D. The fee schedule must estimate by position an hourly rate for EACH TASK described in the Scope of Work per consultant. The fee schedule should also be inclusive of all overhead, G&A, fringe benefits, profit, insurance, printing costs, travel expenses etc. These costs should be specified as "other costs" in the fee schedule.

## **SECTION 7. EVALUATION CRITERIA AND PROCESS**

### **7.1 Criteria**

The successful proposer will be selected using the following evaluation criteria, and associated point values, as follows:

| <b>Points</b> | <b>Criterion</b>                                                  |
|---------------|-------------------------------------------------------------------|
| 15.0          | Experience – Conducting Surveys/ Survey Analysis                  |
| 15.0          | Experience – Housing Market and Redevelopment Planning Experience |
| 5.0           | Technical Expertise                                               |
| 15.0          | Qualifications of Key Personnel                                   |
| 15.0          | Methodology and Approach                                          |
| 10.0          | Management Plan                                                   |
| 6.0           | Project Timeline/Ability to Complete by 3/31/2011                 |
| 4.0           | Contractor Location                                               |
| 15.0          | Fee Schedule                                                      |
| <b>100</b>    | <b>Maximum Points</b>                                             |

### **7.2 Evaluation Process**

A committee of individuals representing the Municipality of Anchorage will perform evaluation of the proposal. The committee will rank the proposal as submitted. MOA reserves the right to award a contract solely on the written proposal.

MOA also reserves the right to request oral interviews with the highest ranked firms (short list). The purpose of the interviews with the highest ranked firms is to allow expansion upon the written responses. If interviews are conducted, a maximum of three (3) firms will be short-listed. A second score sheet will be used to score those firms interviewed. The final selection will be based on the total of all evaluators' scores achieved on the second rating. The same categories and point ranges will be used during the second evaluation as for the first. The highest ranked proposer after the second scoring, if performed, may be invited to enter into final negotiations with MOA for the purposes of contract award.

## **SECTION 8. SELECTION PROCESS**

The Proposer with the highest average evaluation points may be invited to enter into contract negotiations with MOA. If an agreement cannot be reached with the highest ranked Proposer, MOA shall notify the proposer and terminate the negotiations. If proposals are submitted by one or more other proponents determined to be qualified, negotiations may then be conducted with such other proposers in the order of their respective rankings. This process may continue until successful negotiations are achieved. MOA reserves the right to reject any and all proposals submitted.

## **SECTION 9. SAMPLE CONTRACT OR MINIMUM MANDATORY CONTRACT PROVISIONS**

In addition to carefully reading all of the information in the RFP, all Proposers must carefully read and review the attached sample contract (ATTACHMENT A). The successful Proposer shall be required to enter into a Contract with MOA, which will be substantially similar to the sample.

Therefore, the Proposer must make any proposed changes to the sample Contract that the Proposer desires. All changes must be made legibly and conspicuously in red ink on all copies submitted. Page(s) on which the change(s) appear must be tabbed as to be easily identified. The respondent must also provide the rationale for all changes.

**IF NO CHANGES ARE MADE, THE PROPOSER SHALL BE DEEMED TO HAVE ACCEPTED THE SAMPLE CONTRACT. IF THE RESPONDENT MAKES CHANGES, SUCH CHANGES WILL BE CONSIDERED IN ANY NEGOTIATIONS WITH MOA. CHANGES MADE TO THE SAMPLE CONTRACT SHALL NOT BE CONSIDERED DURING PROPOSAL EVALUATIONS.**

## **LIST OF ATTACHMENTS**

ATTACHMENT A – Sample Contract

**ATTACHMENT A**  
**CONTRACT FOR PROFESSIONAL SERVICES**

In consideration of the mutual promises herein, THE MUNICIPALITY OF ANCHORAGE and \_\_\_\_\_ agree as follows. This contract consists of:

- A. Part I, consisting of 16 sections of Special Provisions;
- B. Part II, consisting of 9 sections of General Provisions;
- C. Appendix A- Scope of Work;
- D. Appendix B- Payment Schedule; and
- E. Appendix C- Forms.

**PART I**  
**SPECIAL PROVISIONS**

|                    |                                                           |           |
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**SECTION 1. DEFINITIONS**

In this contract:

- A. "Administrator" means the Director of the Department of Neighborhoods or his/her designee;
- B. "Municipality" means the Municipality of Anchorage; and
- C. "Municipal funds" means all money obtained by the Contractor from or through the Municipality under this agreement.
- D. "Contractor" means XXXX.

**SECTION 2. SCOPE OF SERVICES**

- A. The Contractor shall perform professional services in accordance with Appendix A, which is attached hereto and incorporated in this section by reference.

- B. The Municipality shall not allow any claim for services other than those described in this section. However, the Contractor may provide, at its own expense, any other services that are consistent with this contract.

### **SECTION 3. TIME FOR PERFORMANCE**

- A. This contract becomes effective when signed on behalf of the Municipality.
- B. The Contractor shall commence performance of the work upon signing of the contract. The Contractor shall complete the performance of work no later than March 31, 2011.

### **SECTION 4. AWARD OF CONTRACT**

- A. The Contractor is hereby awarded a contract in an amount up to XX DOLLARS (\$XX). This grant is awarded and may only be accepted subject to each and every covenant, term and condition set forth in this agreement.
- B. Funds shall be paid in amounts indicated on the payment schedule in **Appendix B – Method of Payment**, attached hereto and incorporated by reference. The Municipality may, as a condition of releasing any funds under this agreement, require the Contractor to submit to the Municipality any reports, records, or other materials required. Failure to submit reports required under this agreement may result in the Municipality withholding scheduled payments
- C. The Contractor is not entitled to any compensation under this contract, other than that which is expressly provided for in this section.
- D. As a condition of payment, the Contractor shall have paid all municipal taxes currently due and owing by the Contractor.

### **SECTION 5. TERMINATION OF CONTRACTOR'S SERVICES**

The Contractor's services under Section 2 may be terminated:

- A. By mutual consent of the parties.
- B. For the convenience of the Municipality, provided that the Municipality notifies the Contractor in writing of its intent to terminate under this paragraph at least 10 days prior to the effective date of the termination.
- C. For cause, by either party where the other party fails in any material way to perform its obligations under this contract. Termination under this subsection is subject to the condition that the terminating party notifies the other party of its intent to terminate, stating with reasonable specificity the grounds therefore, and the other party fails to cure the default within thirty (30) days after receiving the notice.

## **SECTION 6. DUTIES UPON TERMINATION**

- A. If the Municipality terminates the Contractor's services for convenience, the Municipality shall pay the Contractor for its actual costs reasonably incurred in performing before termination. Payment under this subsection shall never exceed the total compensation allowable under Section 4. All finished and unfinished documents and materials prepared by the Contractor shall become the property of the Municipality.
- B. If the Contractor's services are terminated for cause, the Municipality shall pay the Contractor the reasonable value of the services satisfactorily rendered prior to termination less any damages suffered by the Municipality because of the Contractor's failure to perform satisfactorily. The reasonable value of the services rendered shall never exceed the contract rate for such services, and payment under this subsection shall not exceed ninety percent (90%) of the total compensation allowable under Section 4. Any finished or unfinished documents or materials prepared by the Contractor under this contract shall become the property of the Municipality at its option.
- C. If the Contractor receives payments exceeding the amount to which it is entitled under subsections A or B of this section, he shall remit the excess to the Administrator within thirty (30) days of receiving notice to do so.
- D. The Contractor shall not be entitled to any compensation under this section until the Contractor has delivered to the Administrator all documents, records, work product, materials and equipment owned by the Municipality and requested by the Administrator.
- E. If the Contractor's services are terminated, for whatever reason, the Contractor shall not claim any compensation under this contract, other than that allowed under this section.
- F. If a final audit has not been performed before the Contractor's services are terminated, The Municipality may recover any payments for costs disallowed as a result of the final audit.
- G. Except as provided in this section, termination of the Contractor's services under Section 5 does not affect any other right or obligation of a party under this contract.

## **SECTION 7. INSURANCE**

- A. The Contractor shall maintain in good standing the insurance described in this section. Before rendering any services under this contract, the Contractor shall furnish the Administrator with proof of insurance in accordance with this section in a form acceptable to the Risk Manager for the Municipality.
- B. The Contractor shall provide the following insurance:
  - a. \$500,000 Employers Liability and Worker's Compensation as required by Alaska Law.
  - b. Commercial Automobile Liability per occurrence in the amount of \$500,000 single limit to include: owned, hired, and non-owned.
  - c. Commercial General Liability in the amount of \$1,000,000 combined single limit to include: Premises Operations, Products and Completed Operations, Blanket Contractual, Broad Form Property Damage, Independent Contractors, and Personal Injury

- C. Each policy of insurance required by this section shall provide for no less 30 days advance notice to the Municipality prior to cancellation.
- D. With the exception of Worker's Compensation each policy shall name the Municipality as an additional insured and the actual policy endorsement shall accompany each Certificate of Insurance.
- E. General Liability and Automobile policies shall be endorsed to waive all rights of subrogation against the Municipality by reason of any payment made for claims under the above coverage. This policy endorsement should accompany each Certificate of Insurance.

## **SECTION 8. FINANCIAL MANAGEMENT SYSTEM**

The Contractor shall establish and maintain a financial management system that:

- A. Provides accurate, current, and complete disclosure of all financial transactions relating to the contract;
- B. Maintains separate accounts by source of funds for all revenues and expenditures and identifies the source and application of funds for the Contractor's performance under this contract, including information pertaining to subcontracts, obligations, unobligated balances, assets, liabilities, outlays and income;
- C. Effectively controls and accounts for all municipal funds and contract property;
- D. Compares actual expenditures with budgeted amounts and relates financial information to performance or productivity data including unit cost information where applicable;
- E. Allocates administrative costs to direct service delivery units;
- F. Minimizes the time between receipt of funds from The Municipality and their disbursement by the Contractor;
- G. Provides accounting records supported by source documentation; and
- H. Provides a systematic method assuring the timely and appropriate resolution of audit findings and recommendations.

## **SECTION 9. REPORTING**

A. The Contractor will submit to the Municipality on forms approved by the Municipality, all required documents and reports on a timely basis, in conformity with Appendix A of this agreement. The use of alternate documents and reporting forms will not be accepted from the Contractor unless the Contractor has requested and received approval for their use in writing from the Municipality prior to submitting them.

B. The Municipality reserves the right to alter the reporting requirements and the payment schedule of the Contractor based on the overall performance of the Contractor. The Municipality will notify the Contractor in writing of any changes in reporting or billing requirements.

C. During normal business hours the Contractor shall permit the Municipality to audit, examine and make excerpts or transcripts from such records, and to make audits of all invoices, materials,

payrolls, personnel records and other data relating to all matters covered by this agreement. The Administrator may authorize individuals to audit, review, monitor, and evaluate all financial and programmatic records of the Contractor to determine compliance with the terms and conditions contained in this agreement. The audits and inspection of records authorized by this Section shall include, but will not be limited to, a review of the organization, general management, financial management, and physical facility.

#### **SECTION 10. PUBLICATION, REPRODUCTION AND USE OF MATERIAL**

Except as otherwise provided herein, all data, documents and materials produced by the Contractor under this contract shall be the property of the Municipality, which shall retain the exclusive right to publish, disclose, distribute and otherwise use, in whole or in part, any such data, documents or other materials. Exclusive rights shall not be attributed to portions of such materials presently in the public domain or which are not subject to copyright.

#### **SECTION 11. ASSIGNMENTS**

Unless otherwise allowed in writing by the Municipality, any assignment by the Contractor of its interest in any part of this agreement or any delegation of duties under this agreement shall be void, and an attempt by the Contractor to assign any part of its interest or delegate duties under this agreement shall give the Municipality the right immediately to terminate this agreement without any liability for work performed.

#### **SECTION 12. NOTICES**

Any notice required pertaining to the subject matter of this contract shall be either personally delivered, sent via facsimile (FAX) or mailed by prepaid first class registered or certified mail, return receipt requested to the following addresses:

The Municipality:     Municipality of Anchorage  
                                 Department of Neighborhoods  
                                 P.O. Box 196650  
                                 The Municipality, AK 99519-6650    FAX: (907) 343-6831

Contractor:

Notices are effective upon the earlier of receipt, proof of good transmission (facsimiles only), or five (5) days after proof of proper posting.

#### **SECTION 13. FORCE MAJEURE**

- A. Any failure to perform by either party due to force majeure shall not be deemed a violation or breach hereof.
- B. As used in this contract, force majeure is an act or event of substantial magnitude, beyond the control of the delayed party, which delays the completion of this contract, including without limitation:

- a. Any interruption, suspension or interference resulting solely from the act of the Municipality or negligent act(s) of the Municipality not otherwise governed by the terms of this contract.
- b. Strikes or work stoppages.
- c. Any interruption, suspension or interference with the project caused by acts of God, or acts of a public enemy, wars, blockades, insurrections, riots, arrests or restraints of governments and people, civil disturbances or similar occurrences.
- d. Order of court, administrative agencies or governmental officers other than the Municipality.

#### **SECTION 14. FUNDING REQUIREMENTS**

In the event that any funding source for this contract should impose additional requirements upon the Municipality for the use of said funds, the Contractor agrees to abide by those additional requirements immediately upon receipt of written notice thereof from the Municipality.

#### **SECTION 15. PROHIBITION ON ENDORSEMENT OF CANDIDATES**

The Contractor agrees that it shall not expend any Municipal Funds for the support, opposition, or endorsement of ballot issues, initiatives or candidates for any state or municipal office; and that it shall not endorse or oppose candidates for state or municipal office even if such endorsement or opposition does not require expenditure of funds. The Contractor understands that after a determination by the Municipality that a violation of this prohibition has occurred it shall result in forfeiture of all unexpended funds for the year in which the violation occurs. The Contractor understands it will also be ineligible for any municipal funds the following fiscal year.

#### **SECTION 16. SUBCONTRACTS**

The Contractor may enter into subcontracts for the purchase of goods and services necessary for the performance of this contract, provided:

- A. Every subcontract shall be reduced to writing and contain a precise description of the services or goods to be provided and the nature of the consideration paid therefore.
- B. Every subcontract under which the Contractor delegates the provision of services shall be subject to review and approval by the Administrator before it is executed by the Contractor.
- C. Every subcontract in an amount exceeding \$1,000.00 shall require reasonable access to business records of the subcontractor relating to the purchase of goods or services pursuant to the subcontract.

## **Part II**

## **GENERAL PROVISIONS**

Part II of this agreement consists of those provisions that are listed below by section number and title.

|           |                             |    |    |
|-----------|-----------------------------|----|----|
| SECTION 1 | RELATIONSHIP OF PARTIES     | 19 |    |
| SECTION 2 | UNALLOWABLE ACTIVITIES      | 19 |    |
| SECTION 3 | PERMITS, LAWS AND TAXES     | 20 |    |
| SECTION 4 | NONWAIVER                   | 20 |    |
| SECTION 5 | AMENDMENT                   | 20 |    |
| SECTION 6 | JURISDICTION; CHOICE OF LAW |    | 20 |
| SECTION 7 | SEVERABILITY                | 20 |    |
| SECTION 8 | INTEGRATION                 | 20 |    |
| SECTION 9 | LIABILITY                   | 21 |    |

### **SECTION 1 RELATIONSHIP OF PARTIES**

The Contractor shall perform its obligations hereunder as an independent contractor. The Municipality may administer the agreement and monitor the compliance of the Contractor with its obligations hereunder. The Municipality shall not supervise or direct the Contractor other than as provided in this agreement.

### **SECTION 2 UNALLOWABLE ACTIVITIES**

#### **A. DISCRIMINATION**

- a. The Contractor will not discriminate against any employee or applicant for employment because of race, color, religion, national origin, ancestry, age, sex, or marital status or who is a "qualified individual with a disability" (as that phrase is defined in the Americans with Disabilities Act of 1990). The Contractor will take affirmative action to ensure that applicants are employed and that employees are treated during employment without regard to their race, color, religion, or mental or physical impairment/disability. Such action shall include, without limitation, employment, upgrading, demotion or transfer, recruitment or recruiting advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training including apprenticeship. The Contractor agrees to post, in conspicuous places available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.
- b. The Contractor shall state, in all solicitations or advertisements for employees to work on agreement jobs, that all qualified applicants will receive equal consideration for employment without regard to race, color, religion, national origin, ancestry, age, sex or marital status, or mental or physical impairment/disability.
- c. The Contractor shall comply with any and all reporting requirements that may apply to it that the Municipality of Anchorage Office of Equal Opportunity Contract Compliance may establish by regulation.
- d. The Contractor shall include the provisions of subsections 1 through 3 of this section in every subcontract or purchase order under this agreement, so as to be binding upon every such subcontractor or vendor of the Contractor under this Grant Agreement.

- e. The Contractor shall comply with all applicable federal, state and municipal laws concerning the prohibition of discrimination including, but not limited to Title 5, Title 7, and Chapter 7.50 of the Anchorage Municipal Code.

### **SECTION 3 PERMITS, LAWS AND TAXES**

The Contractor shall acquire and maintain in good standing all permits, licenses and other entitlements necessary to its performance under this Grant Agreement. All actions taken by the Contractor under this Grant Agreement shall comply with all applicable statutes, ordinances, rules, and regulations. The Contractor shall pay all taxes pertaining to its performance under this Grant Agreement.

### **SECTION 4 NONWAIVER**

The failure of either party at any time to enforce a provision of this agreement shall in no way constitute a waiver of the provision, nor in any way affect the validity of this agreement or any part hereof, or the right of such party thereafter to enforce each and every provision hereof.

### **SECTION 5 AMENDMENT**

D. This Grant Agreement shall only be amended, modified or changed by writing, executed by authorized representatives of the parties, with the same formality as this agreement was executed.

For the purposes of any amendment modification or change to the terms and conditions of this Grant Agreement, the only authorized representatives of the parties are:

Municipality: Mayor, Municipal Manager, or Designee

Contractor: XXX

Any attempt to amend, modify, or change this Grant Agreement by either an unauthorized representative or unauthorized means shall be void.

### **SECTION 6 JURISDICTION; CHOICE OF LAW**

Any civil action rising from this Grant Agreement shall be brought in the Superior Court for the Third Judicial District of the State of Alaska at Anchorage. The laws of the State of Alaska shall govern the rights and obligations of the parties under this Grant Agreement.

### **SECTION 7 SEVERABILITY**

Any provision of this Grant Agreement decreed invalid by a court of competent jurisdiction shall not invalidate the remaining provisions of the Grant Agreement.

### **SECTION 8 INTEGRATION**

This instrument and all appendices and amendments hereto embody the entire Grant Agreement of the parties. There are no promises, terms, conditions or obligations other than those contained herein; and this agreement shall supersede all previous communications, representations or Grant Agreements, either oral or written, between the parties hereto.

## **SECTION 9 LIABILITY**

The Contractor shall indemnify, defend, save, and hold the Municipality harmless from any and all claims, lawsuits or liability, including attorneys' fees and costs, allegedly arising out of, in connection with, or incident to any loss, damage or injury to persons or property or any wrongful or negligent act, error or omission of the Contractor or Prime Contractor or any subcontractor to the Prime Contractor occurring during the course of or as a result of the performance of the Contractor or Prime Contractor or any subcontractor to the Prime Contractor pursuant to this agreement.

IN WITNESS WHEREOF, the parties have executed this contract on the date and at the place shown below.

**MUNICIPALITY OF ANCHORAGE**

**NAME**

\_\_\_\_\_  
Mayor, Municipal Manager or Designee

Date: \_\_\_\_\_

\_\_\_\_\_  
NAME

Date: \_\_\_\_\_

IRS Tax Identification No.: \_\_\_\_\_

Tax Status: Taxable [ ] Non-Taxable [☒]

STATE OF ALASKA )

)ss:

THIRD JUDICIAL DISTRICT )

This is to certify that on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me, the undersigned, a Notary Public in and for the State of Alaska, personally appeared NAME, known to me to be the TITLE of BUSINESS., the corporation named in the foregoing instrument, acknowledged to me that he/she had, in his/her official capacity is authorized by the corporation to execute the foregoing instrument as the free act and deed of the said corporation for the uses and purposes therein stated.

WITNESS my hand and official seal the date and year first above written.

Notary Public in and for Alaska

My commission expires:

## **FUND CERTIFICATION**

\_\_\_\_\_  
Lucinda Mahoney, CFO

Date: \_\_\_\_\_

Funds Available:

**Recommended for Approval**

**Office of Community Planning & Development Signature Authority**

\_\_\_\_\_  
Date: \_\_\_\_\_

Greg Jones, Executive Director, Office of Community Planning & Development

**Appendix A**  
**Scope of Work**

**SECTION 1. SCOPE OF WORK**

TO BE INSERTED UPON ACCEPTANCE OF PROPOSAL

**SECTION 2. ARRA FEDERAL REQUIREMENTS**

- A. This Contract is funded with Federal funds under the American Recovery and Reinvestment Act of 2009, Pub L. 11-5. All provisions of the American Recovery and Reinvestment Act of 2009 apply to this contract.
- a. Subcontractor Approval. This Contract is conditioned on subcontractor approval by the Department of Energy.
  - b. Duns Number. The Contractor must have a DUNS number and maintain a current registration in the Central Contractor Registration at all times during which they have active federal awards funded with Recovery Act funds.
  - c. Federal Debarment. Use of Debarred, Suspended, or Ineligible Contractors: The contractor shall check the Excluded Parties List System of all subcontractors on this project for listing as debarred from participating in federal program at <http://www.epls.gov/>. A printout of the webpage, dated prior to contract execution, shall be kept documenting that the contractor or subcontractor is eligible to receive federal contracts.
  - d. Reports.
    - i. The Contractor must submit a Highest Compensated Officer Certification found in Attachment C prior to contract execution.
    - ii. The Contractor must submit the job creation report found in Appendix D in electronic format to the Municipality of The Municipality, Department of Neighborhoods by the last day each quarter that work under this contract is performed.
    - iii. The Contractor must submit any additional reports that may be required by the Department of Energy.
  - e. Lobbying Restrictions. There shall be no contractors or vendors accepting funding under this award, directly or indirectly to include congressional action on any legislation or appropriation matters pending before Congress, other than to communicate to Members of Congress as described in 18 U.S.C. 1913.
  - f. Access to Records. Any representative of an appropriate inspector general appointed under section 3 or 8G of the Inspector General Act of 1988 (5 U.S.C. App.) or of the Comptroller General may examine any records of the Contractor and to interview any officer or employee of the Contractor.
  - g. Protecting Whistleblowers. An employee of any non-Federal employer receiving covered funds under the American Recovery and Reinvestment Act of 2009, Pub. L. 111-5, may not be discharged, demoted, or otherwise discriminated against as a reprisal for disclosing, including a disclosure made in the ordinary course of an employee's

- duties, to the Accountability and Transparency Board, an inspector general, the Comptroller General, a member of Congress, a State or Federal regulatory or law enforcement agency, a person with supervisory authority over the employee (or other person working for the employer who has the authority to investigate, discover or terminate misconduct), a court or grant jury, the head of a Federal agency, or their representatives information that the employee believes is evidence of:
- i. Gross management of an agency contract or grant relating to covered funds;
  - ii. A gross waste of covered funds;
  - iii. A substantial and specific danger to public health or safety related to the implementation or use of covered funds;
  - iv. An abuse of authority related to the implementation or use of covered funds; or
  - v. As violation of law, rule, or regulation related to an agency contract (including the competition for or negotiation of a contract) or grant, awarded or issued relating to covered funds.
- h. Agency Action: Not later than 30 days after receiving an inspector general report of an alleged reprisal, the head of the agency shall determine whether there is sufficient basis to conclude that the non-Federal employer has subjected the employee to a prohibited reprisal. The agency shall either issue an order denying relief in whole or in part or shall take one or more of the following actions:
- i. Order the employer to take affirmative action to abate the reprisal;
  - ii. Order the employer to reinstate the person to the position that the person held before the reprisal, together with compensation including back pay, compensatory damages, employment benefits, and other terms and conditions of employment that would apply to the person in that position if the reprisal had not been taken;
  - iii. Order the employer to pay the employee an amount equal to the aggregate amount of all costs and expenses (including attorneys' fees and expert witnesses' fees) that were reasonably incurred by the employee for or in connection with, bringing the complaint regarding the reprisal, as determined by the head of a court of competent jurisdiction.
- i. Nonenforceability of Certain Provisions Waiving Rights and remedies or Requiring Arbitration: Except as provided in a collective bargaining agreement, the rights and remedies provided to aggrieved employees by this section may not be waived by any agreement, policy, form, or condition of employment, including any predispute arbitration agreement. No predispute arbitration agreement shall be valid or enforceable if it requires arbitration of a dispute arising out of this section.
- j. Requirement to Post Notice of Rights and Remedies: Any employer receiving covered funds under the American Recovery and Reinvestment Act of 2009, Pub. L. 111-5, shall post notice of the rights and remedies as required therein. (Refer to section 1553 of the American Recovery and Reinvestment Act of 2009, Pub. L. 111-5, [www.Recovery.gov](http://www.Recovery.gov), for specific requirements of this section and prescribed language for the notices.).

- k. False Claims Act. The Contractor shall promptly refer to the DOE or other appropriate Inspector General any credible evidence that a principal, employee, agent, contractor, sub-grantee, subcontractor or other person has submitted a false claim under the False Claims Act or has committed a criminal or civil violation of laws pertaining to fraud, conflict of interest, bribery, gratuity or similar misconduct involving those funds.

**Appendix B**  
**Method of Payment**

**SECTION 1 METHOD OF PAYMENT**

A. Funds will be distributed by the Municipality in the following manner:

1. The Municipality shall reimburse for expenses on a reimbursement basis only.
2. Requests for reimbursement of costs incurred will be provided based on the percentage of work complete and the completion of milestones. As stated below:

**To Be Negotiated**

3. Requests for reimbursement must be documented in contractor statements and submitted to the Administrator with a Project Payment Request Form.
4. Retainer- The final ten percent (10%, equaling \$XX) of the Contract Award shall be retained until all Products have been submitted and approved by the Administrator.

## Appendix C- Forms

### ARRA Highest Compensated Officer Certification

Sub-recipient Name \_\_\_\_\_

Duns Number \_\_\_\_\_

CCR Number \_\_\_\_\_

Sub Recipient Address (Primary Place of Performance)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Amount of Award

\_\_\_\_\_

In the proceeding fiscal year, did you receive more than \$25 million in Federal contracts, loans, grants, and cooperative agreements?

YES NO

In the recipients proceeding fiscal year, did you receive more than 80% of your annual gross revenue in Federal contracts, loans, grants, and cooperative agreements?

YES NO

If you answered YES to both of the questions above, then please provide the name and total compensation amount of the five highest compensated officers

| Officer Name | Compensation Amount |
|--------------|---------------------|
| 1.           |                     |
| 2.           |                     |
| 3.           |                     |
| 4.           |                     |
| 5.           |                     |

To the best of knowledge, I certify that the information above is true and accurate.

Name \_\_\_\_\_

Title \_\_\_\_\_

## Appendix C Forms

### Jobs Created or Retained Worksheet

| Year               | 2010    |         |         |         | 2011    |         |         |         |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|
| Period             | 1st qtr | 2nd qtr | 3rd qtr | 4th qtr | 1st qtr | 2nd qtr | 3rd qtr | 4th qtr |
| Full-time Schedule | 520     | 520     | 520     | 520     | 520     | 520     | 520     | 520     |

| Employee Name or ID |  | Job Description |  |  |  |  |  |  |  |  |
|---------------------|--|-----------------|--|--|--|--|--|--|--|--|
| 1                   |  |                 |  |  |  |  |  |  |  |  |
| 2                   |  |                 |  |  |  |  |  |  |  |  |
| 3                   |  |                 |  |  |  |  |  |  |  |  |
| 4                   |  |                 |  |  |  |  |  |  |  |  |
| 5                   |  |                 |  |  |  |  |  |  |  |  |
| 6                   |  |                 |  |  |  |  |  |  |  |  |
| 7                   |  |                 |  |  |  |  |  |  |  |  |
| 8                   |  |                 |  |  |  |  |  |  |  |  |
| 9                   |  |                 |  |  |  |  |  |  |  |  |
| 10                  |  |                 |  |  |  |  |  |  |  |  |
| 11                  |  |                 |  |  |  |  |  |  |  |  |
| 12                  |  |                 |  |  |  |  |  |  |  |  |
| 13                  |  |                 |  |  |  |  |  |  |  |  |
| 14                  |  |                 |  |  |  |  |  |  |  |  |
| 15                  |  |                 |  |  |  |  |  |  |  |  |

**Total Hours Worked PER QUARTER  
FTE Equivalent**

## Appendix D Fee Schedule

### Housing Market Analysis Fee Schedule

|                                                              | Hourly Rate | Hours on Project | Total |
|--------------------------------------------------------------|-------------|------------------|-------|
| <b>Task 3.1.1: Housing Preference Survey</b>                 |             |                  |       |
| <u>Personnel</u>                                             |             |                  |       |
| (enter consultant name)                                      |             |                  | \$ -  |
| (enter consultant name)                                      |             |                  | \$ -  |
| (enter consultant name)                                      |             |                  | \$ -  |
| (enter consultant name)                                      |             |                  | \$ -  |
| <u>Other Costs</u>                                           |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| <b>Task 3.1.1: TOTAL</b>                                     |             |                  | \$ -  |
| <b>Task 3.1.2: Twenty-Year Housing Demand Projection</b>     |             |                  |       |
| <u>Personnel</u>                                             |             |                  |       |
| (enter consultant name)                                      |             |                  | \$ -  |
| (enter consultant name)                                      |             |                  | \$ -  |
| (enter consultant name)                                      |             |                  | \$ -  |
| (enter consultant name)                                      |             |                  | \$ -  |
| <u>Other Costs</u>                                           |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| (specify)                                                    |             |                  |       |
| <b>Task 3.1.2: TOTAL</b>                                     |             |                  | \$ -  |
| <b>Task 3.1.4: Housing Project Cost/Feasibility Analysis</b> |             |                  |       |
| <u>Personnel</u>                                             |             |                  |       |
| (enter consultant name)                                      |             |                  | \$ -  |
| (enter consultant name)                                      |             |                  | \$ -  |

|                         |    |   |
|-------------------------|----|---|
| (enter consultant name) |    |   |
| (enter consultant name) | \$ | - |

|             |  |  |
|-------------|--|--|
| Other Costs |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |

**Task 3.1.4: TOTAL** \$ -

**Task 3.1.5: Strategies to Facilitate Compact Housing Infill/Redevelopment**

|                         |    |   |
|-------------------------|----|---|
| Personnel               |    |   |
| (enter consultant name) | \$ | - |
| (enter consultant name) |    |   |
| (enter consultant name) | \$ | - |
| (enter consultant name) | \$ | - |

|             |  |  |
|-------------|--|--|
| Other Costs |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |

**Task 3.1.5 TOTAL** \$ -

**Task 3.1.6: Public Process**

|                         |    |   |
|-------------------------|----|---|
| Personnel               |    |   |
| (enter consultant name) | \$ | - |
| (enter consultant name) | \$ | - |
| (enter consultant name) |    |   |
| (enter consultant name) | \$ | - |

|             |  |  |
|-------------|--|--|
| Other Costs |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |
| (specify)   |  |  |

|                            |  |  |             |
|----------------------------|--|--|-------------|
| (specify)                  |  |  |             |
| (specify)                  |  |  |             |
| <b>Task 3.1.6: TOTAL</b>   |  |  | <b>\$ -</b> |
| <b>TOTAL PROPOSAL COST</b> |  |  | <b>\$ -</b> |