

**SERVICE AGREEMENT
FOR ANALYSIS OF IMPEDIMENTS**

THIS AGREEMENT ("Agreement") is made this 7th day of August 2014, by and between the Adams County Board of County Commissioners, located at 4430 South Adams County Parkway, Brighton, Colorado 80601, hereinafter referred to as the "County," and Community Strategies Institute, located at P.O. Box 140387, Edgewater, Colorado 80214, hereinafter referred to as the "Contractor." The County and the Contractor may be collectively referred to herein as the "Parties".

The County and the Contractor, for the consideration herein set forth, agree as follows:

1. SERVICES OF THE CONTRACTOR:

- 1.1. All work shall be in accordance with the attached RFP 2014.139, Section 12.3 Analysis of Impediments and the Contractor's response to the RFP 2014.139, Section 12.3 Analysis of Impediments attached hereto as Exhibit A, and incorporated herein by reference. Should there be any discrepancy between Exhibit A and this Agreement the terms and conditions of this Agreement shall prevail.

- 2. RESPONSIBILITIES OF THE COUNTY:** The County shall provide information as necessary or requested by the Contractor to enable the Contractor's performance under this Agreement.

3. TERM:

- 3.1. Term of Agreement: The Term of this Agreement shall be for one-year from the date of this Agreement.
- 3.2. Extension Option: The County, at its sole option, may offer to extend this Agreement as necessary for up to two, one year extensions providing satisfactory service is given and all terms and conditions of this Agreement have been fulfilled. Such extensions must be mutually agreed upon in writing by the County and the Contractor, and approved by the Adams County Board of County Commissioners.

- 4. PAYMENT AND FEE SCHEDULE:** The County shall pay the Contractor for services furnished under this Agreement, and the Contractor shall accept as full payment for those services, the sum of twenty six thousand dollars (\$26,000.00).

- 4.1. Payment pursuant to this Agreement, whether in full or in part, is subject to and contingent upon the continuing availability of County funds for the purposes hereof. In the event that funds become unavailable, as determined by the County, the County may immediately terminate this Agreement or amend it accordingly.

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5. **INDEPENDENT CONTRACTOR:** In providing services under this Agreement, the Contractor acts as an independent contractor and not as an employee of the County. The Contractor shall be solely and entirely responsible for his/her acts and the acts of his/her employees, agents, servants, and subcontractors during the term and performance of this Agreement. No employee, agent, servant, or subcontractor of the Contractor shall be deemed to be an employee, agent, or servant of the County because of the performance of any services or work under this Agreement. The Contractor, at its expense, shall procure and maintain workers' compensation insurance as required by law. **Pursuant to the Workers' Compensation Act § 8-40-202(2)(b)(IV), C.R.S., as amended, the Contractor understands that it and its employees and servants are not entitled to workers' compensation benefits from the County. The Contractor further understands that it is solely obligated for the payment of federal and state income tax on any moneys earned pursuant to this Agreement.**

6. **NONDISCRIMINATION:**

6.1. **The Contractor shall not discriminate against any employee or qualified applicant for employment because of age, race, color, religion, marital status, disability, sex, or national origin. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices provided by the local public agency setting forth the provisions of this nondiscrimination clause. Adams County is an equal opportunity employer.**

6.1.1. The Contractor will cause the foregoing provisions to be inserted in all subcontracts for any work covered by this Agreement so that such provisions will be binding upon each subcontractor, provided that the foregoing provisions shall not apply to contracts or subcontracts for standard commercial supplies or raw materials.

7. **INDEMNIFICATION:** The Contractor agrees to indemnify and hold harmless the County, its officers, agents, and employees for, from, and against any and all claims, suits, expenses, damages, or other liabilities, including reasonable attorney fees and court costs, arising out of damage or injury to persons, entities, or property, caused or sustained by any person(s) as a result of the Contractor's performance or failure to perform pursuant to the terms of this Agreement or as a result of any subcontractors' performance or failure to perform pursuant to the terms of this Agreement.

8. **INSURANCE:** The Contractor agrees to maintain insurance of the following types and amounts:

8.1. **Commercial General Liability Insurance:** to include products liability, completed operations, contractual, broad form property damage and personal injury.

8.1.1. Each Occurrence: \$1,000,000

8.1.2. General Aggregate: \$2,000,000

8.2. **Comprehensive Automobile Liability Insurance:** to include all motor vehicles owned, hired, leased, or borrowed.

- 8.2.1. Bodily Injury/Property Damage: \$1,000,000 (each accident)
- 8.2.2. Personal Injury Protection: Per Colorado Statutes

8.3. Workers' Compensation Insurance: Per Colorado Statutes

8.4. Professional Liability Insurance: to include coverage for damages or claims for damages arising out of the rendering, or failure to render, any professional services, as applicable.

8.4.1. Each Occurrence: \$1,000,000

8.4.2. This insurance requirement applies only to the Contractors who are performing services under this Agreement as professionals licensed under the laws of the State of Colorado, such as physicians, lawyers, engineers, nurses, mental health providers, and any other licensed professionals.

8.5. Adams County as "Additional Insured": The Contractor's commercial general liability, comprehensive automobile liability, and professional liability insurance policies and/or certificates of insurance shall be issued to include Adams County as an "additional insured" and shall include the following provisions:

8.5.1. Underwriters shall have no right of recovery or subrogation against the County, it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses resulting from the actions or negligence of the Contractor.

8.5.2. The insurance companies issuing the policy or policies shall have no recourse against the County for payment of any premiums due or for any assessments under any form of any policy.

8.5.3. Any and all deductibles contained in any insurance policy shall be assumed by and at the sole risk of the Contractor.

8.6. Licensed Insurers: All insurers of the Contractor must be licensed or approved to do business in the State of Colorado. Upon failure of the Contractor to furnish, deliver and/or maintain such insurance as provided herein, this Agreement, at the election of the County, may be immediately declared suspended, discontinued, or terminated. Failure of the Contractor in obtaining and/or maintaining any required insurance shall not relieve the Contractor from any liability under this Agreement, nor shall the insurance requirements be construed to conflict with the obligations of the Contractor concerning indemnification.

8.7. Endorsement: Each insurance policy herein required shall be endorsed to state that coverage shall not be suspended, voided, or canceled without thirty (30) days prior written notice by certified mail, return receipt requested, to the County.

8.8. Proof of Insurance: At any time during the term of this Agreement, the County may require the Contractor to provide proof of the insurance coverage or policies required under this Agreement.

9. TERMINATION:

9.1. For Cause: If, through any cause, the Contractor fails to fulfill its obligations under this Agreement in a timely and proper manner, or if the Contractor violates any of the covenants, conditions, or stipulations of this Agreement, the County shall thereupon

have the right to immediately terminate this Agreement, upon giving written notice to the Contractor of such termination and specifying the effective date thereof.

- 9.2. For Convenience: The County may terminate this Agreement at any time by giving written notice as specified herein to the other party, which notice shall be given at least thirty (30) days prior to the effective date of the termination. If this Agreement is terminated by the County, the Contractor will be paid an amount that bears the same ratio to the total compensation as the services actually performed bear to the total services the Contractor was to perform under this Agreement, less payments previously made to the Contractor under this Agreement.

10. MUTUAL UNDERSTANDINGS:

- 10.1. Jurisdiction and Venue: The laws of the State of Colorado shall govern as to the interpretation, validity, and effect of this Agreement. The parties agree that jurisdiction and venue for any disputes arising under this Agreement shall be with Adams County, Colorado.
- 10.2. Compliance with Laws: During the performance of this Agreement, the Contractor agrees to strictly adhere to all applicable federal, state, and local laws, rules and regulations, including all licensing and permit requirements. The parties hereto aver that they are familiar with § 18-8-301, et seq., C.R.S. (Bribery and Corrupt Influences), as amended, and § 18-8-401, et seq., C.R.S. (Abuse of Public Office), as amended, and that no violation of such provisions are present. The Contractor warrants that it is in compliance with the residency requirements in §§ 8-17.5-101, et seq., C.R.S. Without limiting the generality of the foregoing, the Contractor expressly agrees to comply with the privacy and security requirements of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
- 10.3. OSHA: The Contractor shall comply with the requirements of the Occupational Safety and Health Act (OSHA) and shall review and comply with the County's safety regulations while on any County property. Failure to comply with any applicable federal, state or local law, rule, or regulation shall give the County the right to terminate this agreement for cause.
- 10.4. Record Retention: The Contractor shall maintain records and documentation of the services provided under this Agreement, including fiscal records, and shall retain the records for a period of three (3) years from the date this Agreement is terminated. Said records and documents shall be subject at all reasonable times to inspection, review, or audit by authorized Federal, State, or County personnel.
- 10.5. Assign Ability: Neither this Agreement, nor any rights hereunder, in whole or in part, shall be assignable or otherwise transferable by the Contractor without the prior written consent of the County.
- 10.6. Waiver: Waiver of strict performance or the breach of any provision of this Agreement shall not be deemed a waiver, nor shall it prejudice the waiving party's right to require strict performance of the same provision, or any other provision in the future, unless such waiver has rendered future performance commercially impossible.

10.7. Force Majeure: Neither party shall be liable for any delay or failure to perform its obligations hereunder to the extent that such delay or failure is caused by a force or event beyond the control of such party including, without limitation, war, embargoes, strikes, governmental restrictions, riots, fires, floods, earthquakes, or other acts of God.

10.8. Notice: Any notices given under this Agreement are deemed to have been received and to be effective: 1) Three (3) days after the same shall have been mailed by certified mail, return receipt requested; 2) Immediately upon hand delivery; or 3) Immediately upon receipt of confirmation that an E-mail was received. For the purposes of this Agreement, any and all notices shall be addressed to the contacts listed below:

Department: Adams County Community and Neighborhood Resources
Contact: Kate Smith
Address: 4430 South Adams County Parkway
City, State, Zip: Brighton Colorado 80601
Phone: 720-523-6061
E-mail: ksmith@adcogov.org

Department: Adams County Purchasing
Contact: Jennifer Tierney
Address: 4430 South Adams County Parkway
City, State, Zip: Brighton, Colorado 80601
Phone: 720-523-6049
E-mail: jtierney@adcogov.org

Department: Adams County Attorney's Office
Address: 4430 South Adams County Parkway
City, State, Zip: Brighton, Colorado 80601
Phone: 720.523.6116

Contractor: Community Strategies Institute
Contact: Tom Hart
Address: PO Box 140387
City, State, Zip: Edgewater, Colorado 80214
Phone: 303-668-2534
E-mail: tomhart875@mho.com

10.9. Integration of Understanding: This Agreement contains the entire understanding of the parties hereto and neither it, nor the rights and obligations hereunder, may be changed, modified, or waived except by an instrument in writing that is signed by the parties hereto.

10.10. Severability: If any provision of this Agreement is determined to be unenforceable or invalid for any reason, the remainder of this Agreement shall remain in effect, unless otherwise terminated in accordance with the terms contained herein.

10.11. Authorization: Each party represents and warrants that it has the power and ability to enter into this Agreement, to grant the rights granted herein, and to perform the duties and obligations herein described.

11. CHANGE ORDERS OR EXTENSIONS:

- 11.1. Change Orders: The County may, from time to time, require changes in the scope of the services of the Contractor to be performed herein including, but not limited to, additional instructions, additional work, and the omission of work previously ordered. The Contractor shall be compensated for all authorized changes in services, pursuant to the applicable provision in the Invitation to Bid, or, if no provision exists, pursuant to the terms of the Change Order.
- 11.2. Extensions: The County may, upon mutual written agreement by the parties, extend the time of completion of services to be performed by the Contractor.

12. COMPLIANCE WITH C.R.S. § 8-17.5-101, ET. SEQ. AS AMENDED 5/13/08: Pursuant to Colorado Revised Statute (C.R.S.), § 8-17.5-101, *et. seq.*, as amended May 13, 2008, the Contractor shall meet the following requirements prior to signing this Agreement (public contract for service) and for the duration thereof:

- 12.1. The Contractor shall certify participation in the E-Verify Program (the electronic employment verification program that is authorized in 8 U.S.C. § 1324a and jointly administered by the United States Department of Homeland Security and the Social Security Administration, or its successor program) or the Department Program (the employment verification program established by the Colorado Department of Labor and Employment pursuant to C.R.S. § 8-17.5-102(5)) on the attached certification.
- 12.2. The Contractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
- 12.3. The Contractor shall not enter into a contract with a subcontractor that fails to certify to the Contractor that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
- 12.4. At the time of signing this public contract for services, the Contractor has confirmed the employment eligibility of all employees who are newly hired for employment to perform work under this public contract for services through participation in either the E-Verify Program or the Department Program.
- 12.5. The Contractor shall not use either the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while this public contract for services is being performed.
- 12.6. If the Contractor obtains actual knowledge that a subcontractor performing work under this public contract for services knowingly employs or contracts with an illegal alien, the Contractor shall: notify the subcontractor and the County within three (3) days that the Contractor has actual knowledge that the subcontractor is employing or contracting with an illegal alien; and terminate the subcontract with the subcontractor if within three days of receiving the notice required pursuant to the previous paragraph, the subcontractor does not stop employing or contracting with the illegal alien; except that

the Contractor shall not terminate the contract with the subcontractor if during such three (3) days the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an illegal alien.

- 12.7. Contractor shall comply with any reasonable requests by the Department of Labor and Employment (the Department) made in the course of an investigation that the Department is undertaking pursuant to the authority established in C.R.S. § 8-17.5-102(5).
- 12.8. If Contractor violates this Section, of this Agreement, the County may terminate this Agreement for breach of contract. If the Agreement is so terminated, the Contractor shall be liable for actual and consequential damages to the County.

The remainder of this page is left blank intentionally.

IN WITNESS WHEREOF, the Parties have caused their names to be affixed hereto:

County Manager

Todd Leopold
Todd Leopold

8/5/14
Date

Community Strategies Institute

Jennifer Rodgers
Signature

7/29/14
Date

Jennifer Rodgers
Printed Name

Director
Title

Attest:

Karen Long, Clerk and Recorder

Mark [Signature]
Deputy Clerk

Approved as to Form:

[Signature]
Adams County Attorney's Office

NOTARIZATION OF CONTRACTOR'S SIGNATURE:

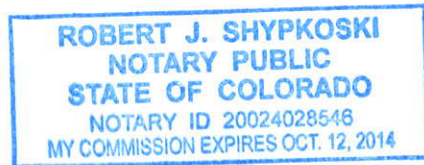
COUNTY OF Denver

STATE OF Colorado)SS.

Signed and sworn to before me this 29th day of July, 2014,

by Jennifer Rodgers,

Robert J. Shypkoski
Notary Public



My commission expires on: 10/12/2014

CONTRACTOR'S CERTIFICATION OF COMPLIANCE

Pursuant to Colorado Revised Statute, § 8-17.5-101, *et. seq.*, as amended 5/13/08, as a prerequisite to entering into a contract for services with Adams County, Colorado, the undersigned Contractor hereby certifies that at the time of this certification, Contractor does not knowingly employ or contract with an illegal alien who will perform work under the attached contract for services and that the Contractor will participate in the E-Verify Program or Department program, as those terms are defined in C.R.S. § 8-17.5-101, *et. seq.* in order to confirm the employment eligibility of all employees who are newly hired for employment to perform work under the attached contract for services.

CONTRACTOR:

Community Strategies Institute 7/29/14
Company Name Date

Jennifer Rodgers
Signature

Jennifer Rodgers
Name (Print or Type)

Director
Title

Note: Registration for the E-Verify Program can be completed at: <https://www.vis-dhs.com/employerregistration>. It is recommended that employers review the sample "memorandum of understanding" available at the website prior to registering

EXHIBIT A

GENERAL INSTRUCTIONS

1. The Adams County Board of Commissioners by and through its Purchasing Division of the Finance Department is accepting proposals for a 2015-2020 Consolidated Plan.
2. All documents related to this RFP will be posted on the Rocky Mountain Bid System at: <http://www.rockymountainbidsystem.com/Bids/ViewOpenSolicitations.asp>
 - 2.1. Vendors must register with this service to receive these documents.
 - 2.2. This service is offered free or with an annual fee for automatic notification services.
3. Written questions may be submitted through June 3, 2014. All questions are to be submitted to Renee Petersen, Purchasing Agent by E-mail at rpetersen@adcogov.org.
4. An Addendum to answer all questions will be issued no later than June 6, 2014.
5. Proposals
 - 5.1. Sealed proposals for consideration will be received at the office of the Purchasing Division of the Finance Department at the Adams County Government Center, 4430 South Adams County Parkway, Fourth Floor, Brighton Colorado 80601, up to 1:00 p.m. on June 10, 2014.
 - 5.2. The proposal opening time shall be according to our clock.
 - 5.3. Proposals will be publicly opened and the names of the companies submitting proposals will be read aloud.
 - 5.4. Proposals may be mailed or delivered in person and **must be** in a sealed envelope clearly labeled with Company Name, Proposal Number and Project Title.
 - 5.5. No proposals will be accepted after the time and date established above except by written addenda.
 - 5.6. The proposal must be submitted on a CD in a single PDF file not to exceed xxx pages. Brochures or other supportive documents may be included with the proposal narrative.
 - 5.7. The two proposal signature pages **“CONTRACTOR’S CERTIFICATION OF COMPLIANCE”** pursuant to Colorado Revised Statute (C.R.S.), § 8-17.5-101, *et. seq.*, as amended 5/13/08, and the **“PROPOSAL FORM”** acknowledging the receipt of addendum(s) must be signed and included as hard copy with the CD. These are the **last two pages of the RFP.**

- 5.8. Proposals may not be withdrawn after date and hour set for closing. Failure to enter contract or honor the purchase order will be cause for removal of supplier's name from the Vendor's List for a period of twelve (12) months from the date of this opening.
- 5.9. In submitting the proposal, the vendor agrees that acceptance of any or all proposals by the Purchasing Manager within a reasonable time or period constitutes a contract. No delivery shall become due or be accepted unless a purchase order shall first have been issued by the Purchasing Division.
- 5.10. The County assumes no responsibility for late deliveries of mail on behalf of the United States Post Office or any other delivery system.
- 5.11. The County assumes no responsibility for a proposal being either opened early or improperly routed if the envelope is not clearly marked on the outside: 2015-2020 Consolidated Plan and 2014.139.
- 5.12. In the event of a situation severe enough to cause the Adams County Board of Commissioners to close the County offices for any reason, the Purchasing Manager has the prerogative of rescheduling the proposal opening time and date. No proposal will be considered above all other proposals by having met the proposal opening time and date requirements to the exclusion of those who were unable to present their proposal due to a situation severe enough to cause the Board of Commissioners to close the County offices.
- 5.13. Proposal must be submitted in the format supplied and/or described by the County. Failure to submit in the format provided may be cause for rejection of the proposal. Proposals must be furnished exclusive of taxes.
- 5.14. No award will be made to any person, firm, or corporation, which is in arrears upon any obligation to the County.
- 5.15. If submitting a joint venture proposal or a proposal involving a partnership arrangement, articles of partnership stating each partner's responsibilities shall be furnished and submitted with the proposal.
- 5.16. The County reserves the right to waive any irregularities or informalities, and the right to accept or reject any and all proposals, including but not limited to:
 - 5.16.1. Any Proposal which does not meet bonding requirements, or,
 - 5.16.2. Proposals which do not furnish the quality, or,
 - 5.16.3. Offer the availability of materials, equipment or services as required by the specifications, description or scope of services, or,
 - 5.16.4. Proposals from offerors who lack experience or financial responsibility, or,
 - 5.16.5. Proposals which are not made to form.

- 5.17. The Board of County Commissioners may rescind the award of any proposal within one week thereof or at its next regularly scheduled meeting; whichever is later, when the public interest will be served thereby.
- 5.18. Issuance of this solicitation does not commit the County to award any Agreement or to procure or Agreement for any equipment, materials or services.
- 5.19. If a formal Agreement is required, the Contractor agrees and understands that a Notice of Award does not constitute an Agreement or create a property interest of any nature until an Agreement is signed by the Awardee and the Board of County Commissioners and/or their authorized designee.
- 5.20. Only sealed proposals received by the Purchasing Division of the Finance Department will be accepted; proposals submitted telephone, E-mail, or facsimile machines are not acceptable.
6. Adams County is an equal opportunity employer.
7. The County ensures that disadvantaged business enterprises will be afforded full opportunity to submit bids in response to all invitations and will not be discriminated against on the grounds of race, color, national origin, age, gender, or disability in consideration for an award.
8. **INSURANCE:** The Contractor agrees to maintain insurance of the following types and amounts:
- 8.1. Commercial General Liability Insurance: to include products liability, completed operations, contractual, broad form property damage and personal injury.
- | | |
|--------------------------|-------------|
| 8.1.1. Each Occurrence | \$1,000,000 |
| 8.1.2. General Aggregate | \$2,000,000 |
- 8.2. Comprehensive Automobile Liability Insurance: to include all motor vehicles owned, hired, leased, or borrowed.
- | | |
|--------------------------------------|-----------------------------|
| 8.2.1. Bodily Injury/Property Damage | \$1,000,000 (each accident) |
| 8.2.2. Personal Injury Protection | Per Colorado Statutes |
- 8.3. Workers' Compensation Insurance: Per Colorado Statutes
- 8.4. Professional Liability Insurance: to include coverage for damages or claims for damages arising out of the rendering, or failure to render, any professional services.
- | | |
|--|-------------|
| 8.4.1. Each Occurrence | \$1,000,000 |
| 8.4.2. This insurance requirement applies only to Contractors who are performing services under this Agreement as professionals licensed under the laws of the State of Colorado, such as physicians, lawyers, engineers, nurses, mental health providers, and any other licensed professionals. | |

- 8.5. The Contractor's commercial general liability, and comprehensive automobile liability insurance policies and/or certificates of insurance shall be issued to include Adams County as an "additional insured," and shall include the following provisions:
- 8.5.1. Underwriters shall have no right of recovery or subrogation against the County, it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses resulting from the actions or negligence of the Contractor.
 - 8.5.2. The insurance companies issuing the policy or policies shall have no response against the County for payment of any premiums due or for any assessments under any form of any policy.
 - 8.5.3. Any and all deductibles contained in any insurance policy shall be assumed by and at the sole risk of the Contractor.
- 8.6. All insurers of the Contractor must be licensed or approved to do business in the State of Colorado. Upon failure of the Contractor to furnish, deliver and/or maintain such insurance as provided herein, this Agreement, at the election of the County, may be immediately declared suspended, discontinued, or terminated. Failure of the Contractor in obtaining and/or maintaining any required insurance shall not relieve the Contractor from any liability under this Agreement, nor shall the insurance requirements be construed to conflict with the obligations of the Contractor concerning indemnification.
- 8.7. Each insurance policy herein required shall be endorsed to state that coverage shall not be suspended, voided, or canceled without thirty (30) days prior written notice by certified mail, return receipt requested, to the County.
- 8.8. At any time during the term of this Agreement, the County may require the Contractor to provide proof of the insurance coverage's or policies required under this Agreement.
- 8.9. The Contractor shall not commence work under this contract until they have submitted to the County and received approval thereof, certificates of insurance showing that they have complied with the foregoing insurance.
- 8.10. All referenced insurance policies and/or certificates of insurance shall be issued to include Adams County as an "additional insured." The name of the proposal or project must appear on the certificate of insurance.
- 8.11. Underwriters shall have no right of recovery or subrogation against the County; it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses covered by the described insurance.
- 8.12. The clause entitled "Other Insurance Provisions" contained in any policy including the County as an additional insured shall not apply to The County.
- 8.13. If any of the said policies shall be or at any time become unsatisfactory to the County as to form or substance, or if a company issuing any such policy shall be or at any time become unsatisfactory to the County, the Contractor shall promptly obtain a new policy,

submit the same to the Purchasing Manager of Adams County for approval and thereafter submit a certificate of insurance as herein above provided. Upon failure of the Contractor to furnish, deliver and maintain such insurance as provided herein, this contract, at the election of the County, may be immediately declared suspended, discontinued or terminated.

9. Contractor shall comply with the requirements of the Occupational Safety and Health Act (OSHA) and shall review and comply with the County's safety regulations while on any County property. Failure to comply with any applicable federal, state or local law, rule, or regulation shall give the County the right to terminate this agreement for cause.
10. COMPLIANCE WITH C.R.S. § 8-17.5-101, ET. SEQ. AS AMENDED 5/13/08: Pursuant to Colorado Revised Statute (C.R.S.), § 8-17.5-101, *et. seq.*, as amended 5/13/08, the Contractor shall meet the following requirements prior to signing this Agreement (public contract for service) and for the duration thereof:
 - 10.1. The Contractor shall certify participation in the E-Verify Program (the electronic employment verification program that is authorized in 8 U.S.C. § 1324a and jointly administered by the United States Department of Homeland Security and the Social Security Administration, or its successor program) or the Department Program (the employment verification program established by the Colorado Department of Labor and Employment pursuant to C.R.S. § 8-17.5-102(5)) on the attached certification.
 - 10.2. The Contractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
 - 10.3. The Contractor shall not enter into a contract with a subcontractor that fails to certify to the Contractor that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
 - 10.4. At the time of signing this public contract for services, the Contractor has confirmed the employment eligibility of all employees who are newly hired for employment to perform work under this public contract for services through participation in either the E-Verify Program or the Department Program.
 - 10.5. The Contractor shall not use either the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while this public contract for services is being performed.
 - 10.6. If Contractor obtains actual knowledge that a subcontractor performing work under this public contract for services knowingly employs or contracts with an illegal alien, the Contractor shall: notify the subcontractor and the County within three days that the Contractor has actual knowledge that the subcontractor is employing or contracting with an illegal alien; and terminate the subcontract with the subcontractor if within three days of receiving the notice required pursuant to the previous paragraph, the subcontractor does not stop employing or contracting with the illegal alien; except that

the Contractor shall not terminate the contract with the subcontractor if during such three days the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an illegal alien.

10.7. Contractor shall comply with any reasonable requests by the Department of Labor and Employment (the Department) made in the course of an investigation that the Department is undertaking pursuant to the authority established in C.R.S. § 8-17.5-102(5).

10.8. If Contractor violates this Section, of this Agreement, the County may terminate this Agreement for breach of contract. If the Agreement is so terminated, the Contractor shall be liable for actual and consequential damages to the County.

End General Information

The remainder of this page is left blank intentionally.

Scope of Work

11. Adams County Community and Neighborhood Resources is seeking an organization to assist in preparing its 2015-2020 Consolidated Plan for submission to the United States Department of Housing and Urban Development in January 2015.
12. Applicants should submit itemized pricing for the following items based on more recent data available per 24 CFR Part 91:
 - 12.1. County-wide Housing and Community Development Needs Assessment
 - 12.2. County-wide Market Analysis
 - 12.3. County-wide Analysis of Impediments
13. Submit a full scope of data and analysis
14. Demonstrate compliance with HUD regulations
15. Evaluation Criteria
 - 15.1. Pricing
 - 15.2. Experience
 - 15.3. Scope of data and analysis
 - 15.4. Compliance with HUD regulations

SAMPLE OF PURCHASE OF SERVICE AGREEMENT

THIS AGREEMENT ("Agreement") is made this ____ day of _____ 2014, by and between the Adams County Board of County Commissioners, located at 4430 South Adams County Parkway, Brighton, Colorado 80601, hereinafter referred to as the "County," and WINNER123, located at ADDRESS123, hereinafter referred to as the "Contractor." The County and the Contractor may be collectively referred to herein as the "Parties".

The County and the Contractor, for the consideration herein set forth, agree as follows:

1. SERVICES OF THE CONTRACTOR:

- 1.1. All work shall be in accordance with the attached RFP xxx and the Contractor's response to the RFP xxx attached hereto as Exhibit A, and incorporated herein by reference. Should there be any discrepancy between Exhibit A and this Agreement the terms and conditions of this Agreement shall prevail.
- 1.2. Emergency Services: In the event the Adams County Board of County Commissioners declares an emergency, the County may request additional services (of the type described in this Agreement or otherwise within the expertise of Contractor) to be performed by Contractor. If County requests such additional services, Contractor shall provide such services in a timely fashion given the nature of the emergency, pursuant to the terms of this Agreement. Unless otherwise agreed to in writing by the parties, Contractor shall bill for such services at the rates provided for in this Agreement.

2. **RESPONSIBILITIES OF THE COUNTY:** The County shall provide information as necessary or requested by the Contractor to enable the Contractor's performance under this Agreement.

3. TERM:

- 3.1. Term of Agreement: The Term of this Agreement shall be for one-year from the date of this Agreement.
- 3.2. Extension Option: The County, at its sole option, may offer to extend this Agreement as necessary for up to two, one year extensions providing satisfactory service is given and all terms and conditions of this Agreement have been fulfilled. Such extensions must be mutually agreed upon in writing by the County and the Contractor, and approved by the Adams County Board of County Commissioners.

4. **PAYMENT AND FEE SCHEDULE:** The County shall pay the Contractor for services furnished under this Agreement, and the Contractor shall accept as full payment for those services, the sum of:
- 4.1. Payment pursuant to this Agreement, whether in full or in part, is subject to and contingent upon the continuing availability of County funds for the purposes hereof. In the event that funds become unavailable, as determined by the County, the County may immediately terminate this Agreement or amend it accordingly.
5. **INDEPENDENT CONTRACTOR:** In providing services under this Agreement, the Contractor acts as an independent Contractor and not as an employee of the County. The Contractor shall be solely and entirely responsible for his/her acts, and the acts of his/her employees, agents, servants, and subcontractors during the term and performance of this Agreement. No employee, agent, servant, or subcontractor of the Contractor shall be deemed to be an employee, agent, or servant of the County because of the performance of any services or work under this Agreement. The Contractor, at its expense, shall procure and maintain workers' compensation insurance as required by law. Pursuant to the Workers' Compensation Act § 8-40-202(2)(b)(IV), C.R.S., as amended, the Contractor understands that it and its employees and servants are not entitled to workers' compensation benefits from the County. The Contractor further understands that it is solely obligated for the payment of federal and state income tax on any moneys earned pursuant to this Agreement.
6. **NONDISCRIMINATION:**
- 6.1. The Contractor shall not discriminate against any employee or qualified applicant for employment because of age, race, color, religion, marital status, disability, sex, or national origin. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices provided by the local public agency setting forth the provisions of this nondiscrimination clause. The County is an equal opportunity employer.
- 6.1.1. The Contractor will cause the foregoing provisions to be inserted in all subcontracts for any work covered by this Agreement so that such provisions will be binding upon each subcontractor, provided that the foregoing provisions shall not apply to contracts or subcontracts for standard commercial supplies or raw materials.
7. **INDEMNIFICATION:** The Contractor agrees to indemnify and hold harmless the County, its officers, agents, and employees for, from, and against any and all claims, suits, expenses, damages, or other liabilities, including reasonable attorney fees and court costs, arising out of damage or injury to persons, entities, or property, caused or sustained by any person(s) as a result of the Contractor's performance or failure to perform pursuant to the terms of this Agreement or as a result of any subcontractors' performance or failure to perform pursuant to the terms of this Agreement.
8. **INSURANCE:** The Contractor agrees to maintain insurance of the following types and amounts:

- 8.1. Commercial General Liability Insurance: to include products liability, completed operations, contractual, broad form property damage and personal injury.
- 8.1.1. Each Occurrence: \$1,000,000
- 8.1.2. General Aggregate: \$2,000,000
- 8.2. Comprehensive Automobile Liability Insurance: to include all motor vehicles owned, hired, leased, or borrowed.
- 8.2.1. Bodily Injury/Property Damage: \$1,000,000 (each accident)
- 8.2.2. Personal Injury Protection: Per Colorado Statutes
- 8.3. Workers' Compensation Insurance: Per Colorado Statutes
- 8.4. Professional Liability Insurance: to include coverage for damages or claims for damages arising out of the rendering, or failure to render, any professional services, as applicable.
- 8.4.1. Each Occurrence: \$1,000,000
- 8.4.2. This insurance requirement applies only to Contractors who are performing services under this Agreement as professionals licensed under the laws of the State of Colorado, such as physicians, lawyers, engineers, nurses, mental health providers, and any other licensed professionals.
- 8.5. The County as "Additional Insured": The Contractor's commercial general liability, comprehensive automobile liability, and professional liability insurance policies and/or certificates of insurance shall be issued to include The County as an "additional insured" and shall include the following provisions:
- 8.5.1. Underwriters shall have no right of recovery or subrogation against the County, it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses resulting from the actions or negligence of the Contractor.
- 8.5.2. The insurance companies issuing the policy or policies shall have no recourse against the County for payment of any premiums due or for any assessments under any form of any policy.
- 8.5.3. Any and all deductibles contained in any insurance policy shall be assumed by and at the sole risk of the Contractor.
- 8.6. Licensed Insurers: All insurers of the Contractor must be licensed or approved to do business in the State of Colorado. Upon failure of the Contractor to furnish, deliver and/or maintain such insurance as provided herein, this Agreement, at the election of the County, may be immediately declared suspended, discontinued, or terminated. Failure of the Contractor in obtaining and/or maintaining any required insurance shall not relieve the Contractor from any liability under this Agreement, nor shall the insurance requirements be construed to conflict with the obligations of the Contractor concerning indemnification.

8.7. Endorsement: Each insurance policy herein required shall be endorsed to state that coverage shall not be suspended, voided, or canceled without thirty (30) days prior written notice by certified mail, return receipt requested, to the County.

8.8. Proof of Insurance: At any time during the term of this Agreement, the County may require the Contractor to provide proof of the insurance coverages or policies required under this Agreement.

9. TERMINATION:

9.1. For Cause: If, through any cause, the Contractor fails to fulfill its obligations under this Agreement in a timely and proper manner, or if the Contractor violates any of the covenants, conditions, or stipulations of this Agreement, the County shall thereupon have the right to immediately terminate this Agreement, upon giving written notice to the Contractor of such termination and specifying the effective date thereof.

9.2. For Convenience: The County may terminate this Agreement at any time by giving written notice as specified herein to the other party, which notice shall be given at least thirty (30) days prior to the effective date of the termination. If this Agreement is terminated by the County, the Contractor will be paid an amount that bears the same ratio to the total compensation as the services actually performed bear to the total services the Contractor was to perform under this Agreement, less payments previously made to the Contractor under this Agreement.

10. MUTUAL UNDERSTANDINGS:

10.1. Jurisdiction and Venue: The laws of the State of Colorado shall govern as to the interpretation, validity, and effect of this Agreement. The parties agree that jurisdiction and venue for any disputes arising under this Agreement shall be with Adams County, Colorado.

10.2. Compliance with Laws: During the performance of this Agreement, the Contractor agrees to strictly adhere to all applicable federal, state, and local laws, rules and regulations, including all licensing and permit requirements. The parties hereto aver that they are familiar with § 18-8-301, et seq., C.R.S. (Bribery and Corrupt Influences), as amended, and § 18-8-401, et seq., C.R.S. (Abuse of Public Office), as amended, and that no violation of such provisions are present. Contractor warrants that it is in compliance with the residency requirements in §§ 8-17.5-101, et seq., C.R.S. Without limiting the generality of the foregoing, the Contractor expressly agrees to comply with the privacy and security requirements of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

10.3. OSHA: Contractor shall comply with the requirements of the Occupational Safety and Health Act (OSHA) and shall review and comply with the County's safety

regulations while on any County property. Failure to comply with any applicable federal, state or local law, rule, or regulation shall give the County the right to terminate this agreement for cause.

- 10.4. Record Retention: The Contractor shall maintain records and documentation of the services provided under this Agreement, including fiscal records, and shall retain the records for a period of three (3) years from the date this Agreement is terminated. Said records and documents shall be subject at all reasonable times to inspection, review, or audit by authorized Federal, State, or County personnel.
- 10.5. Assign ability: Neither this Agreement, nor any rights hereunder, in whole or in part, shall be assignable or otherwise transferable by the Contractor without the prior written consent of the County.
- 10.6. Waiver: Waiver of strict performance or the breach of any provision of this Agreement shall not be deemed a waiver, nor shall it prejudice the waiving party's right to require strict performance of the same provision, or any other provision in the future, unless such waiver has rendered future performance commercially impossible.
- 10.7. Force Majeure: Neither party shall be liable for any delay or failure to perform its obligations hereunder to the extent that such delay or failure is caused by a force or event beyond the control of such party including, without limitation, war, embargoes, strikes, governmental restrictions, riots, fires, floods, earthquakes, or other acts of God.
- 10.8. Notice: Any notices given under this Agreement are deemed to have been received and to be effective: (1) Three (3) days after the same shall have been mailed by certified mail, return receipt requested; (2) Immediately upon hand delivery; or (3) Immediately upon receipt of confirmation that an E-mail was received. For the purposes of this Agreement, any and all notices shall be addressed to the contacts listed below:

Department: Adams County (department name)
Contact:
Address:
City, State, Zip:
Phone:
E-mail:

Department: Adams County Purchasing
Contact:
Address: 4430 South Adams County Parkway
City, State, Zip: Brighton, Colorado 80601
Phone:
E-mail:

Department: Adams County Attorney's Office
Address: 4430 South Adams County Parkway
City, State, Zip: Brighton, Colorado 80601
Phone: 720.523.6116
E-mail:

Contractor: Winner123
Contact:
Address:
City, State, Zip:
Phone:
E-mail:

10.9. Integration of Understanding: This Agreement contains the entire understanding of the parties hereto and neither it, nor the rights and obligations hereunder, may be changed, modified, or waived except by an instrument in writing that is signed by the parties hereto.

10.10. Severability: If any provision of this Agreement is determined to be unenforceable or invalid for any reason, the remainder of this Agreement shall remain in effect, unless otherwise terminated in accordance with the terms contained herein.

10.11. Authorization: Each party represents and warrants that it has the power and ability to enter into this Agreement, to grant the rights granted herein, and to perform the duties and obligations herein described.

11. CHANGE ORDERS OR EXTENSIONS:

11.1. Change Orders: The County may, from time to time, require changes in the scope of the services of the Contractor to be performed herein including, but not limited to, additional instructions, additional work, and the omission of work previously ordered. The Contractor shall be compensated for all authorized changes in services, pursuant to the applicable provision in the Invitation to Bid, or, if no provision exists, pursuant to the terms of the Change Order.

11.2. Extensions: The County may, upon mutual written agreement by the parties, extend the time of completion of services to be performed by the Contractor.

12. COMPLIANCE WITH C.R.S. § 8-17.5-101, ET. SEQ. AS AMENDED 5/13/08: Pursuant to Colorado Revised Statute (C.R.S.), § 8-17.5-101, *et. seq.*, as amended May 13, 2008, the Contractor shall meet the following requirements prior to signing this Agreement (public contract for service) and for the duration thereof:

12.1. The Contractor shall certify participation in the E-Verify Program (the electronic employment verification program that is authorized in 8 U.S.C. § 1324a and jointly

administered by the United States Department of Homeland Security and the Social Security Administration, or its successor program) or the Department Program (the employment verification program established by the Colorado Department of Labor and Employment pursuant to C.R.S. § 8-17.5-102(5)) on the attached certification.

- 12.2. The Contractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
- 12.3. The Contractor shall not enter into a contract with a subcontractor that fails to certify to the Contractor that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
- 12.4. At the time of signing this public contract for services, the Contractor has confirmed the employment eligibility of all employees who are newly hired for employment to perform work under this public contract for services through participation in either the E-Verify Program or the Department Program.
- 12.5. The Contractor shall not use either the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while this public contract for services is being performed.
- 12.6. If Contractor obtains actual knowledge that a subcontractor performing work under this public contract for services knowingly employs or contracts with an illegal alien, the Contractor shall: notify the subcontractor and the County within three days that the Contractor has actual knowledge that the subcontractor is employing or contracting with an illegal alien; and terminate the subcontract with the subcontractor if within three days of receiving the notice required pursuant to the previous paragraph, the subcontractor does not stop employing or contracting with the illegal alien, except that the Contractor shall not terminate the contract with the subcontractor if during such three days the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an illegal alien.
- 12.7. Contractor shall comply with any reasonable requests by the Department of Labor and Employment (the Department) made in the course of an investigation that the Department is undertaking pursuant to the authority established in C.R.S. § 8-17.5-102(5).
- 12.8. If the Contractor violates this Section, of this Agreement, the County may terminate this Agreement for breach of contract. If the Agreement is so terminated, the Contractor shall be liable for actual and consequential damages to the County.

Submittal Checklist

- ☐ Response to RFP
- ☐ W-9
- ☐ Contractor's Certification of Compliance
- ☐ Proposal Form

CONTRACTOR'S CERTIFICATION OF COMPLIANCE

Pursuant to Colorado Revised Statute, § 8-17.5-101, *et. seq.*, as amended 5/13/08, as a prerequisite to entering into a contract for services with Adams County, Colorado, the undersigned Contractor hereby certifies that at the time of this certification, Contractor does not knowingly employ or contract with an illegal alien who will perform work under the attached contract for services and that the Contractor will participate in the E-Verify Program or Department program, as those terms are defined in C.R.S. § 8-17.5-101, *et. seq.* in order to confirm the employment eligibility of all employees who are newly hired for employment to perform work under the attached contract for services.

CONTRACTOR:

Company Name

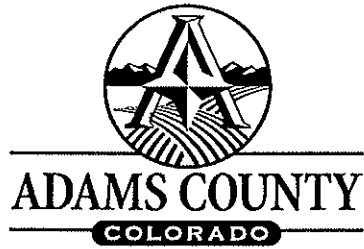
Date

Name (Print or Type)

Signature

Title

Note: Registration for the E-Verify Program can be completed at: <https://www.vis-dhs.com/employerregistration>. It is recommended that employers review the sample "memorandum of understanding" available at the website prior to registering



PROPOSAL FORM
2014.139
2015-2020 Consolidated Plan

VENDOR'S STATEMENT

I have read and fully understand all the special conditions herein set forth in the foregoing paragraphs, and by my signature set forth hereunder, I hereby agree to comply with all said special conditions as stated or implied. In consideration of the above statement, the following proposal is hereby submitted.

Written Amount _____ \$ _____
Amount

WE, THE UNDERSIGNED, HEREBY ACKNOWLEDGE RECEIPT OF

Addenda # _____ Addenda # _____
If None, Please write NONE.

_____	_____
Company Name	Date
_____	_____
Address	Signature
_____	_____
City, State, Zip Code	Printed Name
_____	_____
County	Title
_____	_____
Telephone	Fax
_____	_____
E-mail Address	_____



P.O. Box 140387, Edgewater, CO 80214

www.csicolorado.org

303-668-2534

communitystrategiesinstitute

**Adams County
Consolidated Plan and Analysis of Impediments to Fair Housing
Choice
RFP #2014.139
Proposal**

Prepared For:

Adams County Community and Neighborhood Resources
c/o Adams County Purchasing
Adams County Government Center
4430 South Adams County Parkway
Brighton, CO 80601

Submitted By:

Community Strategies Institute
P.O. Box 140387
Edgewater, CO 80214
(303) 902-9028

Date: June 10, 2014



P.O. Box 140387, Edgewater, CO 80214

www.csicolorado.org

303-668-2534

June 10, 2014

Adams County Purchasing Division
Adams County Government Center
4430 South Adams County Parkway
Brighton, CO 80601

Dear Ms. Petersen,

The Community Strategies Institute (CSI) is pleased to submit this proposal to prepare a Housing Needs Assessment and Analysis of Impediments to Fair Housing Choice for Adams County.

CSI Directors and Associates have been working with local governments throughout the West to improve their housing programs since 2003. As former Managers of government housing agencies, we have a wealth of knowledge related to housing market analysis, assessing housing needs, and developing recommendations to local governments for meeting identified housing needs. Directors Hart and Rodgers have worked with many local governments and government agencies to design agency responses to needs, including determining the roles and responsibilities of local government staff and local housing providers. We work efficiently and in a timely manner with all clients.

We have worked with local governments, preparing data in numerous Housing Needs Assessments across Colorado, Wyoming, Utah, New Mexico and Montana. Clients receive usable data and market analysis, and recommendations and strategies based upon our years of experience working at the nonprofit, government, and technical assistance levels. CSI also prepares HUD required planning documents, including Analysis of Impediments to Fair Housing Choice and Five Year Consolidated Plans for the Region VIII HUD office. CSI submittals have all been accepted by HUD.

CSI is composed of two Directors and four associates. Tom Hart and Jennie Rodgers, the CSI Directors, lead each CSI project. For purposes of the Adams County proposal, you may contact Tom Hart, Director, (303) 902-9028, tomhart875@mho.com. Our firm address is P.O. Box 140387, Edgewater, CO 80214, and our web address is csicolorado.org.

Please do not hesitate to contact Tom with any questions about this proposal.

Sincerely,

Jennie Rodgers, Director, Authorized Signatory

Executive Summary

The Community Strategies Institute, a local consulting firm, is pleased to provide this proposal in response to RFP 2014.139. CSI offers a unique approach to the two projects of producing an Analysis of Impediments to Fair Housing Choice and a Housing Needs Assessment. CSI understands that the work outlined in the RFP must meet the requirements of HUD. CSI has unique experience and expertise to offer Adams County because it is one of the consulting firms that HUD has engaged to develop training materials and toolkits to assist local governments in learning to use the new eCon Planning Suite to complete their Consolidated Plan.

Project Approach: The Adams County Housing Needs Assessment will be a report that meets all HUD guidelines for data collection for the Five Year Consolidated Plan and Annual Action Plan Housing Needs Assessment and Market Analysis Sections. A public outreach and participation component will conform to the County Public Participation Plan and provide citizens with multiple opportunities to be informed and provide comment on the project. CSI will develop the Assessment in a way that also will allow the document to be used at the local level for planning with local agencies, local leaders, developers, and the community.

The Analysis of Impediments to Fair Housing Choice study will include all necessary and required data, analysis, and community engagement outlined in the Fair Housing Planning Guide Volume 1. CSI's approach includes interviews with key organizations and agencies, data review, and public forums that meet all HUD guidelines. Our Analysis of Impediment reports have always been accepted by HUD's Region 8 Field Office.

CSI has included a detailed work plan in the narrative section on the project approach, which delineates what products and tasks will be completed for a **Full Proposal** or **Modified Proposal**. The work plan also demonstrates that the scope of work can be completed by CSI in the time frame specified in the RFP.

Staffing: CSI will provide an expert, experienced staff to both lead the process and carry out all tasks involved. CSI Directors Hart and Rodgers have many years experience in working on Consolidated Plan and AI documents. CSI Associates have unique education and qualifications to form a strong team that has been working together for over nine years.

Pricing: CSI has provided a detailed budget proposal. CSI prefers to complete both work items. Because there will be efficiencies in working on the two products at the same time, CSI has offered the County a discount if the County chooses to contract with CSI for both the Housing Needs Assessment and the Analysis of Impediments studies.

1. Project Understanding

CSI specializes in providing detailed analysis of housing needs and strategies to communicate those needs to local and state governments. Our team has written numerous Housing Needs Assessments for local governments in Colorado and the West, statewide housing needs assessments for the states of Colorado and New Mexico, as well as Analysis of Impediments to Fair Housing Choice and Consolidated Plans at the state and local level. Our work is recognized as being thorough and detailed, with recommendations that go beyond those of other firms, which may not have the depth of expertise and background in HUD program management, Consolidated Plan development, and local level affordable housing development and program management that CSI brings to the table.

The Adams County Housing Needs Assessment will be a report that meets all HUD guidelines for data collection for the Five Year Consolidated Plan and Annual Action Plan Housing Needs Assessment and Market Analysis Sections. CSI will develop the Assessment in a way that also will allow the document to be used at the local level for planning with local agencies, local leaders, developers, and the community. CSI presently is under subcontract to HUD to create training presentations and toolkits to assist local governments in implementing the eCon Planning Suite which was unveiled by HUD this summer. CSI Directors are national leaders in training communities on use of the new eCon Planning Suite Consolidated Planning tools, and will develop an Assessment that uses the new tools in conjunction with local and other state and national data, and which can be loaded into the new IDIS based Consolidated Plan template by Adams County staff.

The Analysis of Impediments to Fair Housing Choice study will include all necessary and required data, analysis, and community engagement outlined in the Fair Housing Planning Guide Volume 1. CSI's approach includes interviews with key organizations and agencies, data review, and public forums that meet all HUD guidelines. Our Analysis of Impediment reports have always been accepted by HUD's Region 8 Field Office. The report will identify impediments to Fair Housing in Adams County and the incorporated areas, provide a Fair Housing Action Plan, as well as report on progress and actions since the 2007 AI report to break down barriers to fair housing. Our final report will ensure that Adams County can take appropriate actions to overcome the effects of any impediments identified through the analysis.

CSI has reviewed the Scope of Work and developed an approach that meets the requirements and intent of the Adams County RFP and Adams County's expectations for the final products. CSI works hard to satisfy our customers by setting out a detailed work plan with local staff at project initiation, providing frequent updates on progress, allowing local staff to review and comment on draft documents, and presenting materials to local leaders, industry members, and residents in a way that educates and engages the public. We have learned from past projects how best to engage our clients while not overwhelming them during a project. We utilize best practices for involving residents and the community in the development of HUD plans, and design studies that not only meet checklists and criteria, but that help local staff create their own strategic plans, goals, and objectives.

Our firm is local, and our two Directors will be the lead staff conducting interviews, working with local staff, and writing the reports. Our firm has three Associates who will work alongside the Directors to create data elements of the plans, create maps, and conduct research. Because our firm is fairly small, our clients have the benefit of working alongside the Directors throughout a project. Our projects are never assigned to "junior" staff members. Our Directors have worked in Adams County during our 25+ year tenure at the State Division of Housing and at CSI, and are familiar not only with the community, but with the affordable housing projects, programs, and providers within the community.

2. Qualifications

a. Profile of the Firm

The Directors of Community Strategies Institute have over 60 years of combined experience in housing development, planning, market analysis, government policy, finance and training. Much of that experience has involved working for government agencies. CSI Directors and associates have worked extensively in the Rocky Mountain Region performing housing needs assessments, HUD required planning documents, market studies, and developing implementation strategies in Colorado, Wyoming, Utah, Montana, and New Mexico.

At the State Division of Housing, CSI Directors had direct oversight of the HOME, CDBG and ESG federal block grant programs, as well as the State of Colorado Private Activity Bond Program. Directors and Associates are experts in the rules and requirements of these funding resources, as well as others financing resources such as the Low Income Housing Tax Credit and NSP programs. Hart and Rodgers have successfully submitted Consolidated Plan Documents, Annual Action Plans and Analysis of Impediments to Fair Housing Choice Reports which have been approved by HUD. Tom Hart, Jennie Rodgers, Annette Boyer, and Rachel Rohner, Paula Lundquist and Jay Kenny will be the team to work on the Adams County Housing Needs Assessment and Analysis of Impediments to Fair Housing Choice should CSI be engaged to conduct the studies.

b. Staffing

The Adams County team will be lead by Tom Hart and Jennie Rodgers, Directors. The CSI Directors will be joined by Associates Annette Boyer, Rachel Rohner, and Jay Kenney, as well as support staff Paula Lundquist. Annette Boyer is responsible for demographic data and projections. Rachel Rohner will oversee the surveys and conduct housing research for project. Jay Kenney will produce maps of relevant data in GIS. Paula Lundquist is a research assistant and assists coordinating meetings and forums. The team has worked together on numerous Housing Needs Assessments, Consolidated Plans, Analysis of Impediments and Market Studies throughout the western United States and each is a strong performer on past projects. Ms. Rohner, Ms. Boyer, and Ms. Lundquist will be assigned to this project part time as needed.

Tom Hart, Director

As the former Director of the Colorado Division of Housing, Mr. Hart developed programs and plans resulting in the largest production increase of affordable housing units in the state's history. Hart took an active lead role in formulating the first statewide affordable housing investment strategy known as the Comprehensive Housing Affordability Strategy (later the Consolidated Plan). This plan involved designing the framework and process for conducting an analysis of housing needs for the state and then identifying priorities linked to a strategic plan to address those housing needs. Under Mr. Hart's leadership, the Division of Housing assisted local communities in identifying local needs and priorities and then linking local agencies and resources to establish programs and projects. Using a bottom up planning approach, division plans resulted in over a \$100 million dollar investment in affordable housing during Mr. Hart's thirteen year tenure.

Mr. Hart is a 1972 graduate of the University of Colorado with a major in English. Over the years Hart has pursued graduate studies in management, construction trades, and real estate finance. For over 30 years, he has worked as a market researcher, real estate broker, educator, property manager, policy consultant and general partner in real estate investment partnerships. While serving as the executive director of a regional housing development organization in Southwest Colorado, Mr. Hart directed community housing and needs assessments including the La Plata County Housing Needs Study published in 1991.

Mr. Hart has designed and implemented a variety of planning processes and tools to be used by communities in identifying housing needs, creating action plans to meet those needs and incorporating those plans into partnerships to create specific outcomes.

Jennie Rodgers, Director (Project Lead)

Ms. Rodgers has over 20 years experience in the arena of affordable housing finance and development. She has worked in the nonprofit, private and government sectors on urban and rural housing initiatives. Starting her career by developing a homeless shelter and homeless services in Durango, Colorado, Ms. Rodgers moved on to a housing consultancy firm, an urban nonprofit, and finally the State of Colorado Division of Housing. For 11 years, she helped local agencies and governments to identify housing needs, create local services, develop real estate and establish nonprofit agencies, including those in mountain communities, which was part of her service territory. Rodgers took the lead in writing the state's Analysis of Impediments to Fair Housing Choice as well as the Consolidated Plan and performance reports required under the Consolidated Plan.

Rodgers is the co-author of many publications on housing needs in Colorado; a guidebook to assist local governments solve their affordable housing problems and various statistical analyses on the impact state and local programs have had on Colorado's housing needs. Ms. Rodgers has created training products aimed at local

government officials, nonprofit and for profit developers, and agency staff which administer federal housing programs.

Ms. Rodgers has a B.A. in Anthropology and Business from Vanderbilt University. She is a certified HOME specialist in Regulations and Administration. She served on the Fannie Mae Colorado Advisory Board and is a past member of the Colorado Coordinating Council for the Homeless, and the Legislative Committee of Housing Colorado. She is a HOME Certified Specialist in Regulations and Administration.

Annette Boyer, Associate

Ms. Boyer is a former statistical analyst for the Colorado Department of Local Affairs, Office of the State Demographer, where she was responsible for analyzing and presenting data from the 2000 census, developing and presenting household income data and creating a model to forecast the State's population growth by race. Boyer recently completed database projects for the City of Denver and the State of Colorado. The Access based database engine is used by Denver to track its affordable housing inventory. The state sponsored database allows online users to calculate rent burdened households for each county.

While employed at the Summit County Community Development Department, Boyer was responsible for overseeing planning requests, including subdivisions, rezoning and master plans. Ms. Boyer was responsible for statistical research and development, technical writing, and making presentations as a senior planner with the City of Colorado Springs. Ms. Boyer has served on the Idaho Springs City Council.

Ms. Boyer has a MA in geography from the University of Chicago and an undergraduate degree in Developmental Economics from American University.

Rachel Rohner

Rachel Rohner has worked in the area of affordable housing for over 20 years. Her experience includes non-profit housing and homeless service provision at the Colorado Coalition for the Homeless and at Neighbor to Neighbor, Inc. in Northern Colorado. Rachel's experience also includes public housing program administration at the US Department of Housing and Urban Development (HUD). At HUD, she also served as the Department's designee to the Metro Denver Homeless Initiative Board (MDHI) and established interagency partnerships in the areas of Fair Housing, prevention of unfair lending practices, and with Health and Human Services (HHS) office of Civil Rights on disability issues.

Rachel served as a Program Manager at the Aurora Housing Authority in the Housing Choice Voucher (HCV) program prior to entering graduate school at the University of Denver. Rachel has worked for the Colorado Division of Housing to support grantees statewide in the utilization of HOME, CDBG, ESG and state housing development funds.

Most recently, Rachel worked for the Department of Veterans Affairs in Colorado as a Clinical Case Manager in the Health Care for Homeless and VASH Voucher Veteran's Programs (HCHV).

She is a Licensed Clinical Social Worker (LCSW) who received her Master's Degree at the University of Denver and her Bachelor of Arts Degree at Colorado State University. She is a member of the National Association of Social Workers.

Jay Kenny, CSI GIS Coordinator

Jay Kenny works with CSI on GIS related projects. Mr. Kenny uses the ESRI ArcGIS platform and also works with Excel and Access Databases. His CSI projects include the Denver properties databases, and creating the data sets identifying properties along light rail lines and near high frequency bus routes. He has also created GIS analysis for various Housing Needs Assessments completed by CSI. His other projects include authoring Great Road Rides Denver, a comprehensive guidebook to cycling in Denver, including 31 maps derived from GPS ground work, regional, state, and local GIS data sets, and 13 maps for a guidebook entitled Steppin' Out West for the Colorado State Parks Department.

Mr. Kenny has a graduate certificate in Geographic Information Systems from the University of Denver University College, a Juris Doctor in Law from DU, and a BA from Harvard University.

3. Experience

a. **Detailed Experience in Completing Housing Needs Assessments and Analysis of Impediments to Fair Housing Choice**

The CSI team members have a unique working relationship. The team has worked together in a non-profit setting and in a state agency for a number of years. The Directors has been working to strengthen local communities since 1989. That depth of experience will ensure a quality product for Adams County. CSI believes that its extensive experience in working with communities will produce a quality Housing Needs Assessment for the Five Year Consolidated Plan and Analysis of Impediments to Fair Housing Choice Study.

CSI manages many projects, including Housing Needs Assessments and Strategic Plans for local communities, Consolidated Plans and Analysis of Impediments to Fair Housing Choice, nonprofit Strategic and Funding Plans, agency portfolio reviews, market studies, funding packages and technical assistance plans. We are retained by government agencies and HUD grantees because of our programmatic and program management expertise, and are known for our vast databank of knowledge related to HUD funding sources and program management best practices. Some examples of past projects are:

- Housing Needs Assessments:
- Thornton, Colorado, underway
- Bernalillo County, New Mexico, underway
- Arapahoe County, Colorado, 2014
- City of Longmont, Colorado, 2012
- Clear Creek County, Colorado 2012
- City of Portales, New Mexico, 2011
- Delta County, Colorado 2011
- Teller County Housing Market Assessment Update, 2011
- Alamosa and Monte Vista, Colorado 2010
- Larimer County, Colorado, 2009
- San Luis Valley Six County assessment, 2009
- Provo, Utah, 2009
- Montrose County, Colorado, 2009
- State of New Mexico, statewide housing assessment, 2008
- Bent County, Colorado, 2008
- Logan and Morgan Counties, 2007
- Lakewood, Colorado, 2007
- Sheridan County, Wyoming, 2006.
- Campbell County, Wyoming, 2005.
- South Central CHDO, Huerfano and Las Animas Counties, 2005

These reports outline the housing conditions and markets that exist in each community. The reports outline a strategic plan for meeting housing challenges, including identification of leaders for each step, priorities and estimated costs.

Consolidated Plans:

Lehi City, Utah, underway
Bernalillo County, New Mexico, underway
Arapahoe County, Colorado, 2014
South Jordan, Utah, 2012

Analysis of Impediments to Fair Housing Choice:

Thornton, Colorado, 2014
Bernalillo County, New Mexico, underway
Arapahoe County, Colorado, 2014
Piovo, Utah, 2009
Lakewood, Colorado, 2007

OneCPD Consolidated Planning Webinar, Direct TA, and Toolkit, 2012 (current). CSI is part of an Enterprise Community Partners OneCPD technical assistance team working directly with HUD to create one of the new Consolidated Planning eCon Planning Suite webinars and Toolkits. Our work involves developing the content for a Webinar related to leverage and planning for investment of HUD dollars, and use of the new IDIS based Consolidated Planning system. Our team will also be developing a Toolkit with more in-depth information related to maximizing investments of HUD dollars.

CSI was also involved with a team providing direct assistance to the City of Los Angeles related to CDP Maps, the new Consolidated Plan mapping tool, and the IDIS based Consolidated Planning process and content. Jennie Rodgers traveled to LA with a team which provided training to City Commissions, City Staff, and other partners related to CDP Consolidated Planning and CDP Maps as they related to the Los Angeles Consolidated Plan.

City of Alexandria, Virginia Housing Master Plan. 2011. CSI was engaged by the City of Alexandria Virginia as part of the team creating the Alexandria Housing Master Plan. CSI is conducting research into developing local policies, programs, legislation and funding resources regarding preservation of affordable housing and transit oriented housing development.

Denver Housing Plan. 2008. CSI prepared a Housing Resource Directory as part of the Denver Housing Plan and is also assisting the Task Force preparing the plan with identifying and crafting action steps and strategies and the cost for implementing these strategies. As part of the Resource Directory research and report, CSI directors identified gaps in the financing system for affordable housing in Denver and made recommendations on expanded and better use of existing or potential resources within the City. CSI is also creating an investment plan for the Denver Housing Plan and an analysis of new tax alternatives for funding affordable housing projects.

State of New Mexico Mortgage Finance Authority. 2008. CSI completed a Regional Housing Authority Plan for the NMMFA which includes a statewide Housing Needs Assessment, regional housing needs summaries and recommendations regarding the structure and financing of the regional housing authority system in New Mexico. As part

of this project, CSI has conducted community and individual meetings and interviews across the state. The finished document incorporated the elements of the New Mexico Affordable Housing Statute into a template that MFA has used a model for those local communities wishing to formulate their own housing plans.

Market Studies:

Chestnut, LIHTC Market Study, 2013, LIHTC Rental Development, Denver, CO
The Edge, LIHTC Market Study, 2013, LIHTC Rental Development, Loveland, CO
40 West Residences, LIHTC Market Study, 2013, LIHTC Rental Development, Lakewood CO
Riverside Apartments LIHTC Market Study, 2012, LIHTC/RD 515 Rental Development in Kalispell, MT
Thermopolis, Wyoming Market Study, 2011, LIHTC/RD 515 Rental Development
Teller County, Colorado Market Study, 2010, mixed affordable rental and for-sale development
Village Creek Townhomes Market Study, 2010, expiring LIHTC property converting to homeownership
Rio Grande Village Phase II Rental Market Study, 2007, affordable rentals
Rocky Mountain Community Land Trust Market Study, 2007, affordable homeownership
Riverton, Wyoming Market Study, 2004, affordable subdivision or subsidized rental project
High Meadows Subdivision Market Study, Florence Colorado, 2005, affordable homeownership

These reports outline the housing conditions and markets that exist in each community.

Recent and current CSI clients include:

- Adams County Housing Authority
- Adams County Community Development Agency
- City of Lakewood, Colorado
- City of Thornton, Colorado
- Arapahoe County, Colorado
- Colorado State Division of Housing
- City of Denver Housing and Neighborhood Development Services Office
- Denver Housing Authority
- Loveland, CO Housing Authority
- City of Alexandria, Virginia
- Enterprise Community Partners
- City of Alexandria, Virginia
- State of New Mexico Mortgage Finance Authority
- New Mexico State Board of Finance
- Redevelopment Authority of the City of Provo, Utah
- Montrose County Colorado Housing Authority
- City of Loveland, Colorado
- Alamosa County, Colorado
- Habitat for Humanity of Colorado
- Denver Department of Human Services
- City of Durango, Colorado
- South Central Colorado Council of Governments, Colorado
- Northeast Colorado Housing, Inc.
- Bent County Development Foundation, Colorado
- Hope Communities, Inc.
- The Aurora Housing Authority, Aurora Colorado
- McDermott Properties, Denver
- Neighborhood Reinvestment Corporation (NeighborWorks)
- PacifiCap Properties Corporation
- FNMA Colorado Partnership Office
- Medici Communities, Inc.
- MBR Development, Inc.
- Rocky Mountain Community Land Trust
- City of Missoula, Montana Housing Authority
- City of Sheridan Wyoming Planning Department
- Sheridan County, Wyoming
- Sheridan Housing Action Committee (SHAC)
- City of Gillette, Wyoming/Campbell County Econ. Dev. Corporation
- Rural Community Assistance Corporation
- Housing Solutions of the Southwest
- Upper Arkansas Council of Governments
- Region 10 Economic and Planning District
- Wyoming Housing Network
- LIFE Homeless Housing Agency, Adams County, Colorado
- District XI Human Resource Council, Missoula MT
- Wyoming Housing Opportunities Association, Cheyenne, WY
- Enterprise Community Partners
- City of Arvada Housing and Redevelopment
- City of South Jordan, Utah
- Lehi City, Utah

References

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b. Familiarity with Consolidated Plan Regs and Fair Housing Requirements

While at the Colorado Division of Housing, Rodgers was the lead staff person responsible for completion of the completion of the Colorado Consolidated Plan, Annual Action Plans, Analysis of Impediments to Fair Housing Choice, Citizen Participation Plan and CAPER Reports. While employed by the State of Colorado, our work using the Consolidated and Annual Plan to create internal goals tracked and measured at the staff level was recognized by HUD in one of its "best practices publications".

CSI was hired by the City of Lakewood in 2007 to complete a Housing Needs Assessment for the City, and to write the City of Lakewood Analysis of Impediments to Fair Housing Choice. We recently completed a Five Year Consolidated Plan for Arapahoe County, Colorado. Our most recent engagement with ABT Associates is creating a Toolkit, training, and webinar for HUD on the use of the new IDIS based Consolidated Planning template and related CDP Mapping system to maximize leverage of HUD resources, target funds geographically, and identify key partnerships for meeting goals within the plan. CSI have become experts in best practices for use of the new tool, and have provided training as part of an Enterprise team to the City of Los Angeles staff on the use of the new CDP tools.

4. Approach and Schedule

Project Approach – Housing Needs Assessment

a. Understanding of Requirements, Commitment to Timing and CSI Qualifications

CSI understands the Adams County wishes to complete a Housing Needs Assessment during the months of July through October of 2014 (in order to prepare the Consolidated Plan and submit the plan to HUD by January 2015). The Housing Needs Assessment will cover all of Adams County, excluding Aurora. CSI will create an assessment that considers the urban and rural nature of Adams County, and the incorporated municipalities within the County and other communities. The completed Housing Needs Assessment will provide all the information required to complete the Housing Needs Assessment and Market Analysis sections of the 2015-2019 Consolidated Plan for Adams County in IDIS Online.

CSI is a local firm, and our team is familiar with County housing program, programs run by local nonprofit agencies, the Housing Authority and low income developments built by private developers within the County. Our firm has completed statewide and local HUD planning documents that have been accepted by HUD Region 8 staff. Our background administering HUD programs and developing and managing affordable housing at the local level make us uniquely qualified to make rational and informed conclusions and recommendations that can be followed by the County to overcome housing needs and housing impediments. We are in the process of completing the City of Thornton Analysis of Impediments to Fair Housing Choice and a Housing Needs Assessment.

b. Detailed Work Plan for Housing Needs Assessment

CSI proposes to develop a Housing Needs Assessment that meets all HUD requirements for the Housing Needs and Market Analysis Sections of the Consolidated Plan and the County's requirements for the project as outlined in the RFP. The proposed budget reflects the need for active cooperation from Adams County staff. In developing the work plan for the study, CSI will rely on local leaders in a number of areas, including:

- Logistical planning-making arrangements for gratis meeting rooms for focus groups.
- Providing CSI with names and contact information for members of the community who have involvement in housing, including real estate, and other economic sectors, as well as those who represent major employers and human service agencies.
- Providing CSI with copies of previous surveys, maps, studies, plans, ordinances, and other relevant information to determine the regulatory environment within the area.
- Serving as advisors and reviewers of CSI draft documents.

Initial Coordination Meeting

To begin the Housing Needs Assessment for Adams County, CSI and County staff will hold the Initial Coordination Meeting. At this meeting, CSI and County Staff will begin to finalize the public process required for the Needs Assessment, determining how best to include public participation and outreach, public forums and notifications of all public participation opportunities.

CSI will also gather information about community agencies, County resources, existing documents and research, and contacts at this Coordination Meeting. Our proposal assumes that CSI will undertake all research, public meeting facilitation, and report writing.

CSI understands that Adams County requests a Housing Needs Assessment that identifies the housing needs in Adams County and municipalities within the county and which makes recommendations for an Action Plan. The data and analysis presented in the Assessment must also be inclusive of all housing data elements needed to complete the new HUD Consolidated Plan template Housing Needs Assessment and Market Analysis sections of the plan in IDIS.

CSI's **full proposal** is to write a stand-alone Housing Needs Assessment. Because there are constituency groups in Adams County that are more interested in housing needs than the very particular format of the HUD documents, it is important that the Housing Needs Assessment stand on its own as a report that is useable by the public. However, the completed Housing Needs Assessment will provide all the information required to complete the Housing Needs Assessment and Market Analysis sections of the 2014-2018 Consolidated Plan for Adams County in IDIS Online. The **modified proposal** will include just the basic elements necessary to complete the HUD IDIS online Needs Assessment and Market Analysis sections.

CSI will follow the requirements outlined in 24 CFR Part 91 and subsequent guidance offered in other HUD IDIS Consolidated Planning tools. CSI will use the Desk Guide for Using IDIS to Prepare the Consolidated Plan, published in July of 2012 to create a data analysis that will include pre-loaded into IDIS demographic, housing and economic data specific to Adams County. CSI will work with Adams County staff to gain access to the Consolidated Plan Template within the Adams County IDIS system.

HUD encourages grantees to use the data provided within the template, unless the local government can show that the data is flawed. With this in mind, CSI will download all pre-loaded data at the beginning of the project and analyze it to ensure that HUD provided data appears accurate.

In a **Full Housing Needs Assessment** CSI will provide supplemental data and narrative which the County may choose to add to the Consolidated Plan Housing Needs section by manually putting it into the IDIS template as attachments. CSI will utilize the format required for the new Consolidated Plan Template so that the data and charts from the Housing Needs Assessment will be easily imported into the HUD document. CSI

will reference in this section of the Project Approach what supplemental research and information will be included. In the **Modified Housing Needs Assessment**, CSI will prepare and upload supplemental data and analysis as directed in the IDIS Consolidated Plan Guidebook.

Housing Needs Assessment (Con Plan Template Screens NA-10/NA-15)

Preloaded data that will be used in the Housing Needs Assessment analysis includes:

- Population and household numbers and trends
- Median income and changes over time
- Households by type and HUD income range
- Housing problems by tenure and income range
- Number of housing problems by tenure and income range
- Cost burdened households by tenure and income range
- Overcrowded households by tenure and income range
- Disproportionate Housing Problems by race and ethnicity

CSI will complete the Needs/Housing Table within the template, and prepare the required narrative. In this narrative, we will describe the estimated housing needs projected for the next five year period for the following categories of persons:

- extremely low-income, low-income, moderate-income, and middle-income families;
- renters and owners;
- elderly persons;
- single persons;
- large families;
- public housing residents;
- families on the public housing and section 8 tenant-based waiting list;
- persons with HIV/AIDS and their families;
- victims of domestic violence
- persons with disabilities;

We will discuss specific housing problems, including: cost-burden, severe cost-burden, substandard housing, and overcrowding (especially large families) and substandard conditions being experienced by extremely low-income, low-income, moderate-income, and middle-income renters and owners. We will identify any racial or ethnic group that has a disproportionately greater need (Screens NA 15-NA30) for housing than the population as a whole. We will define the terms "standard condition" and "substandard condition but suitable for rehabilitation."

We will use 2010 Census, 2012 American Community Survey, CDP Maps data, [IDIS Online](#), local MLS data, Metro Denver Apartment Vacancy Survey data, Colorado Demography Section population projections, and Colorado Department of Labor and Employment Labor Market Information, and

Supplemental Housing Inventory Data and Analysis (full proposal)

Homeownership. Using current MLS listings, past sales, and data from the Adams County Clerk and the County Assessor CSI will provide data on:

- The number of units currently for sale by structure type including single family detached housing, town homes , condominium units and modular housing;
- Current mean and median sales prices by structure type;
- Listing price distribution of current units by structure type;
- Trends in listings by structure type;
- Mean and median sales prices of sold units by structure type;
- Trends in units sold by structure type;
- Trends in distribution of sales prices of units sold by structure type;

Future trends in housing construction will be examined. Comparisons will be made between the local housing market and others in the region and state.

Rental Housing. Using the Metro Denver Rent and Vacancy survey of rental properties in Adams County (and identified jurisdictions within the survey) and other available rental market data, CSI will provide data on:

- Current rent levels;
- Trends in rent levels;
- Current year and trends in rent per square foot rates;
- Current year information and trends in vacancy rates.

Public and Assisted Housing (Consolidated Plan Template NA-35)

In cooperation with the Public Housing Authorities serving Adams County, CSI will describe the needs of public housing units, including:

- the number of public housing units in the County,
- the physical condition of such units,
- the restoration and revitalization needs of public housing projects within the County,
- the number of families on public housing and tenant-based waiting lists and
- results from the Section 504 needs assessment of public housing projects located within the County.

CSI will also describe the number and targeting (income level and type of household served) of units currently assisted by local, state, or federally funded programs in the County and provide an assessment of whether any units are expected to be lost from the assisted housing inventory for any reason, (i.e. expiration of Section 8 contracts).

Characteristics of current public housing residents by public housing program type from the Public and Indian Housing Information System will be presented, including:

- incomes,
- household size,

- race and ethnicity
- disability or elderly status,
- length of stay

CSI will analyze the 504 needs of public housing tenants, and identify the number and types of families on the waiting list for public housing and Section 8 tenant based rental assistance programs at each Housing Authority. CSI will compare their housing needs to the housing needs of the population at large.

Supplemental Housing Gaps and Estimated Housing Need Data and Analysis (full proposal)

Supply Demand Analysis. A supply demand analysis for housing units, or gaps analysis, for households at various AMI levels will be provided for the County, including all affordable income ranges. CSI will estimate the housing gap for renters and owners by the following income ranges:

- 0 – 30% AMI
- 31 – 50% AMI
- 51 – 60% AMI
- 61 - 80% AMI
- 81 – 100% AMI
- Over 100% AMI

This supply/demand analysis will also summarize the housing mix that will best satisfy projected demand for of various types of housing units.

Information from the supply/demand analysis will be used in the recommendations section of the report to identify types of housing to be built, income levels to be served, and preferred building locations within the County. Impediments to accessing housing for people of all income groups will be identified.

CSI will list all assumptions and conclusions regarding the development of this gaps analysis model. CSI will also provide an estimate of the trends in affordability and funding gaps for low and moderate income owners.

Homeless Needs (Consolidated Plan Template NA-40)

CSI will complete a Homeless Needs Table using the new IDIS format. We will provide:

- a concise summary of the nature and extent of sheltered and unsheltered homelessness, (including chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth),
- the number of persons experiencing homelessness on a given night,
- the number of persons who experience homelessness each year,
- the number of persons that exit homelessness each year;
- the number of days that persons experience homelessness, in accordance with Template instructions

- race and ethnicity of the sheltered and unsheltered homeless population

At the present time, IDIS Online does not include homeless data because of inconsistent reporting areas between the boundaries of the local Continuum reporting of Point in Time and service data in the HMIS and the CDBG/HOME Jurisdictions. CSI will collect and use this information for Adams County as a base for the homeless needs assessment section of the report.

This summary will identify the characteristics and needs of low-income individuals and families with children, who are currently housed but threatened with homelessness. CSI will use information from the Metro Denver Point in Time study, and information gathered from local homeless agencies to create this summary.

Non-homeless Special Needs (Consolidated Plan Template NA-45)

We will estimate, to the extent practicable, the number of persons in various subpopulations that are not homeless but may require housing or supportive services, including the:

- elderly,
- frail elderly,
- persons with disabilities (mental, physical, developmental, persons with HIV/AIDS and their families),
- persons with alcohol or other drug addiction,
- victims of domestic violence, and
- public housing residents.

CSI will provide narrative summaries of the characteristics of these populations, their housing and supportive service needs of these special needs populations that can be entered into Table NA-45.

Supplemental Demographic, Economic Conditions and Employment Data and Analysis (full proposal)

Using Claritas Data, and data from the Colorado Department of Local Affairs Demography section, CSI will provide a current, historic and a five year projection of population data for the county and municipalities. This analysis will include statistics by age, ethnicity, number of children and number of seniors. Sources of change including migration and natural growth will also be presented. Commuting patterns will be analyzed using Census Bureau LED On the Map data.

Economic Conditions. CSI will examine local economic conditions, major industries, the labor force, and local economic development resources. We will examine the location, type, growth potential and labor force needs of major industries and employers. We will highlight employment trends that may result in increases or decreases in housing demand.

Employment. CSI will use information from the Colorado Department of Labor and Employment, Claritas data, the State Demographer's Office, BEA Data, Colorado Office of Economic Development and International Trade, and local resources to gather information related to:

- Historic, current and projected employment levels;
- employment trends by industry;
- wage trends by industry;
- trends in unemployment rates and

Housing Market Analysis (Consolidated Plan Template MA-05-MA-50)

The Consolidated Plan Market Analysis is meant to provide the basis for the Strategic Plan portion of the Consolidated Plan. CSI will complete the Housing Market Analysis section of our report in accordance with all requirements included in MA-05-MA50 screens as prescribed in the Consolidated Plan Template.

CSI will describe the significant characteristics of the housing market in terms of supply, demand, condition, and the cost of housing; the housing stock available to serve persons with disabilities; and to serve persons with HIV/AIDS and their families. We will provide estimates of the number housing units by tenure, type and location, the price range of housing available, the number and location of subsidized units, an analysis of planned developments and how they will impact supply, and an evaluation of the age and condition of existing housing by selected neighborhoods.

CSI will also provide an estimate, to the extent information is available, of the number of vacant or abandoned buildings and whether units in these buildings are suitable for rehabilitation.

Market Analysis Overview (Consolidated Plan Template MA-05)

CSI will summarize the key points and findings of the market analysis section. Included in the overview will be:

- the significant characteristics of the Adams County housing market in general including supply, demand, condition and cost-of-housing
- the housing stock available to persons with disabilities
- the conditions and needs of public and assisted housing
- an inventory of facilities, housing and services that meet the needs of homeless persons
- regulatory environment as it creates barriers to access affordable housing
- economic data related to jobs and income

CSI will coordinate with Adams County GIS staff to utilize existing mapping resources to provide graphic representation of housing market conditions in the County. Additionally, CSI will utilize its own GIS capabilities to create specialized maps to illustrate various market conditions. When possible, CSI will draw on the CPD Maps HUD

resources as another way of providing in-depth information on sub-areas of the County that may reflect higher housing needs or problems.

General Characteristics of the Housing Market (Consolidated Plan Template MA-10 through MA-20)

CSI will provide an inventory of the housing units in Adams County. That inventory will include tabulations to provide:

- All rental properties by number of units in property
- Unit size by tenure and price to determine the number of affordable owner units by income

CSI will also describe the number and targeting (income level and type of household served) of units currently assisted by local, state, or federally funded programs in the County and provide an assessment of whether any units are expected to be lost from the assisted housing inventory for any reason, (i.e. expiration of Section 8 contracts).

CSI will provide the following information to report on the cost of housing in Adams County:

- Cost of housing – Median Home Value and Median Contract Rent
- Rent paid table
- Units affordable at households by income range
- HUD Fair Market and HOME Rent Limits

CSI will provide a narrative summarizing our findings and conclusions about the rental market in Adams County that can be included in the MA-10 – MA-20 Tables.

Condition of Housing (Consolidated Plan Template MA-20)

CSI will provide a narrative on the condition of the housing stock with information on:

- the condition of units
- Year of construction
- Risk of lead-based paint hazard
- Vacant or abandoned units
- REO Properties and Abandoned REO properties (as available)

Supplemental Data and Analysis (full proposal)

Housing Problems: Using HUD data, local agency data, and public trustee data, CSI will provide an analysis regarding the conditions of the housing inventory, the need for rehabilitation of the current housing stock, specific community issues, and problems related to evictions and foreclosures in the region.

Public and Assisted Housing (Consolidated Plan Template MA-25)

In cooperation with the Public Housing Authorities serving Adams County, CSI will describe the needs of public housing, including:

- the number of public housing units and vouchers available in the County,
- the physical condition of such units,
- the restoration and revitalization needs of public housing projects within the County,
- the number of families on public housing and tenant-based waiting lists
- results from the Section 504 needs assessment of public housing projects located within the County
- Strategies by housing authorities to improve the living environment of low and moderate income families living in public housing.

Homeless Facilities and Services (Consolidated Plan Template MA-30)

CSI will prepare an inventory of existing facilities, housing, and services in the County that meet the needs of homeless persons, particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth.

Supplemental Homeless Data and Analysis: (full proposal)

CSI will report on homeless facilities in Adams County by contacting the Metro Denver Homeless Initiative to obtain the homeless facility inventory charts for emergency shelter facilities, transitional housing units with supportive services, and permanent supportive housing for homeless individuals who need supportive services to live independently. We will list the complementary supportive services available to homeless families within Adams County, and those that are not but are needed.

Special Needs Facilities and Services (Consolidated Plan Template MA-35)

CSI will describe the facilities and services that assist persons who are not homeless but require supportive housing within Adams County.

Barriers to Affordable Housing (Consolidated Plan Template MA-40)

CSI will determine if the cost of housing or the incentives to develop, maintain, or improve affordable housing barriers to Adams County residents obtaining affordable housing. Such policies that will be examined include:

- tax policy
- land use controls
- zoning ordinances
- building codes

- fees and other charges for development
- growth limits
- policies that effect the return on residential investment

Community Resources and Financial Tools (full proposal)

CSI will provide a narrative section in the report that describes the availability of mortgage and other capital to finance new housing projects, and provide an analysis of the diversity of financial products and programs that can meet the wide range of community housing needs. This section will look at programs and products available on a statewide and local basis. CSI will also review the local down payment assistance and homeowner rehabilitation programs, as well as pre-and post counseling programs that are available to homebuyers. CSI is very familiar with affordable housing programs in Adams County, the metro Denver area, and the State of Colorado, and can add thoughtful recommendations regarding capital and programmatic needs.

Recommendations and Suggestions for Items in the Strategic Plan and Annual Action Plan (full proposal)

CSI will utilize its data analysis, information gathered from the local community meetings and focus groups, as well as state and federal housing program resources and requirements, to develop recommendations to address housing needs identified by the research. These recommendations and accompanying narrative will highlight local needs and challenges. The recommendations will be grouped under broad goals which can be linked to other County planning and policy objectives relating to housing.

The scope of the recommendations will reflect the need for various housing types and uses such as multifamily rental, single family detached, and attached for-sale units. Recommendations will look at whether changes need to be made to the existing regulatory system or housing programs, and whether new systems or programs need to be created. Suggestions on priorities will be included which reflect under-served populations. These recommendations will include ideas on how all entities can work collectively towards achieving the targeted housing priorities in the County.

Public Outreach and Public Participation (full proposal)

As part of the Consolidated Planning process, HUD wants to ensure that local citizens and advocacy groups have the opportunity to be informed of the jurisdictions past performance and planned priorities and actions. As part of the Consolidated Planning process, local jurisdictions are required to solicit citizen input both on planned actions and past performance. Any well researched housing assessment also gathers input from the local community on local housing needs and possible actions to address those needs. The Community Strategies Institute emphasizes community and stakeholder involvement in the housing needs assessments that it conducts around the nation.

By gathering citizen and stakeholder input related to housing needs in Adams County and related to Impediments to Fair Housing Choice at the same time, Adams County can realize savings and efficiencies in the Public Participation requirements of the

Consolidated Plan/AI process. CSI has designed a public participation process that will satisfy HUD requirements and provide opportunities for both the public, stakeholders, residents of assisted housing and service providers to contribute input into the planning process and past performance. In addition to the approach outlined below, there are also Public Participation actions that CSI has described within the section of this narrative dealing with the Analysis of Impediments to Fair Housing. There are specific requirements for consultations with housing trade groups that don't apply to the broader Public Participation Plan.

Public Participation and Public Outreach Approach (full proposal)

CSI will consult with Adams County to ensure that the public participation and public outreach aspects of our approach are consistent with and incorporated into the Public Participation Plan that the County has previously adopted. CSI will coordinate with Adams County staff to hold one public meeting to present a draft Housing Needs Assessment report with tentative findings and strategies. Participants will be asked to provide input on priorities and actions as referenced in the draft assessment report. The public will also be asked to provide comment and reaction to past performance for the programs and actions contained in the previous action plan. Adams County staff will determine the location of the meeting and arrange for space for up to 50 people that is accessible. Once the Housing Needs Assessment is in its final form, a second public meeting will be held to review the report and its findings.

CSI believes that focus groups are a good tool to gain input from stakeholders and beneficiaries of the programs the County sponsors through its Consolidate Plan. Two focus groups will be held in locations determined by the County staff. The focus group meetings will be held early, as soon as preliminary data and recommendations are available in order to incorporate the focus group findings into the draft of the report. CSI will ask for stakeholder input on the following topics:

- Confirmation of local housing needs for both renters and owners
- Input on how priorities should be arranged in the Consolidated Plan
- Comment on how past performance has met previous goals and objectives
- Input on Barriers to Housing Choice in the community
- Suggestions for actions over the five year period to ensure that identified priority needs are met within resource limitations

In addition to meetings and focus group sessions, it is important to involve the community through the use of the Internet and other media. As CSI prepares for the meetings to discuss the draft housing needs assessment and the meeting to discuss the final draft of the report, it is important that the product is widely available to the citizens of Adams County. CSI recommends that in conjunction with County staff, press releases are prepared to inform citizens that they may look at the text by clicking on a button on the County website. There may be other Adams County stakeholders that also would sponsor a link to the draft report through their website. The County will also have to make free, paper copies available to anyone who requests one at a designated County office.

As the County nears the deadline for the adoption of a new Consolidated Plan, it will be necessary to follow the timelines prescribed by HUD for publication of notice about adoption of the plan. These requirements are beyond the time horizon of the time outlined in this RFP. Once the County has the finished documents, it can schedule new hearings to meet the requirements contained in the Consolidate plan regulations. However, if the County engages CSI to complete the work outlined in this RFP, Adams County will have a compliant document that will contain all the Housing Needs Assessment and Market Analysis components HUD requires.

Schedule

a. Project Timeline

CSI proposes the following work schedule, which assumes a July 14th project start date. The schedule can be adjusted if a contract is not executed by June 30, 2014. The timeline can be adjusted during negotiations. CSI plans to meet the timeline laid out in the RFP, and is used to producing planning documents for HUD within required timeframes.

Calendar	July	Aug	Sept	Oct
Meeting with County Staff to Initiative Project	■			
Analysis of Demand for Housing	■	■		
Market Analysis	■	■		
Economic Conditions and Labor Market	■	■		
Public Meetings		■		■
Recommendations For Action Plan			■	■
Write and Edit Report			■	■
Draft edit meeting and editing of document				■
Public Hearing and Presentation to Commissioners				■
Delivery of Final Housing Needs Assessment				■

Presentation to the Board of Commissioners at a Public Hearing

CSI's Directors will present the report data, data trends, future housing demand, finding and conclusions to the Board of Commissioners, using a PowerPoint presentation and handouts identifying key data and findings. CSI will be prepared to answer questions from Commissioners or the public, and provide feedback on recommendations outlined in the action plan.

Project Approach – Analysis of Impediments to Fair Housing Choice Study

a. Understanding of Requirements, Commitment to Timing and CSI Qualifications

CSI understands that Adams County wishes to complete a new Analysis of Impediments to Fair Housing Choice Study (AI) during the months of July through December of 2014. This study must be developed as described in the Fair Housing Planning Guide, Volume I, published by HUD, and must be accepted by HUD after review. The AI will cover all of Adams County, excluding the City of Aurora. CSI will create an AI that considers the urban and rural nature of Adams County, and the incorporated municipalities within the County. This plan will include information, analysis, and identification of impediments, as well as suggested actions that the County can take to overcome the effects of any impediments identified through the analysis.

b. Detailed Work Plan for Analysis of Impediments to Fair Housing Choice Study

CSI proposes to develop an Analysis of Impediments to Fair Housing Choice that meets all HUD requirements and the County's requirements for the project as outlined in the RFP. The proposed budget reflects the need for active cooperation from Adams County staff. In developing the work plan for the study, CSI will rely on local leaders in a number of areas, including:

- Logistical planning-making arrangements for gratis meeting rooms for focus groups.
- Providing CSI with names and contact information for members of the community who have involvement in housing, including real estate, and other economic sectors, as well as those who represent major employers and human service agencies.
- Providing CSI with copies of previous surveys, maps, studies, plans, ordinances, and other relevant information to determine the regulatory environment within the area.
- Serving as advisors and reviewers of CSI draft documents.

Initial Coordination Meeting

To begin an AI for Adams County, CSI and County staff will hold the Initial Coordination Meeting. At this meeting, CSI and County Staff will begin to finalize the public process required for the AI, determining how best to include public participation and outreach, public forums and notifications of all public participation opportunities.

CSI will also gather information about community agencies, County resources, existing documents and research, and contacts at this Coordination Meeting. Our proposal assumes that CSI will undertake all research, public meeting facilitation, and report writing.

Demographic, Income, Employment, and Housing Analysis

HUD emphasizes the use of the data from the Consolidated Plan and the Annual Performance Report, local housing needs assessments, as well as data from Fair Housing Organizations, local governmental entities, advocacy groups, housing providers, banks,

educational institutions and the general public to create an Analysis of Impediments to Fair Housing Choice covering Adams County excluding Aurora.

CSI will use data from the Adams County Housing Needs Assessment being created at the same time, One Year Action Plan, 2012 and 2010 Census data, data and information from past Analysis of Impediments studies, data and maps provided by the County, and other locally gathered data as a base to write the report and provide maps of certain data elements that enhance the assessment. Data will be presented for the County excluding Aurora, and, when possible, for the incorporated areas within the County. Additional updated data will come from:

- US Census,
- Bureau of Economic Analysis,
- Colorado Department of Local Affairs Demography Office,
- Colorado Department of Labor and Employment,
- Local MLS listings,
- Apartment Association of Metro Denver Rent and Vacancy Survey,
- Novogradac Company LIHTC Property Mapping Data
- CSI created Mile High Connects Equity Atlas data identifying affordable restricted and non-restricted rental properties in Adams County,
- CPD Maps data, Consolidated Plan template data,
- Service Providers
- HMIS and Point-in-Time Homeless Data
- HMDA (Home Mortgage Disclosure Act)
- Foreclosure Data from Public Trustee, PolicyMap and Foreclosure-Response.org
- HUD's Office of Fair Housing and Equal Opportunity (FHEO),
- The Colorado Civil Rights Division (CCRD),
- The Colorado Division of Real Estate,
- The Colorado Cross-Disability Coalition,
- Colorado Legal Services,
- The Legal Center for Persons with Disabilities and Older People
- and other sources.

The demographic, income, employment and housing analysis will include:

Demographic Analysis

- Population and Households, current, and forecasts and household characteristics
- Age of Population: Current, forecasts, trends
- Race and ethnicity of population: current, trends
 - Language spoken, trends
 - Place of birth
 - School enrollment by race and ethnicity
 - ELL student trends in schools
- Population moving in and out of Adams County and surrounding areas trends
- Disability population descriptions, mobility and self care limitations
- Homeless populations, services, trends, homeless students
- Other special needs populations

- Data tables and maps for demographic information as needed

Income Analysis

- Incomes by tenure, description of low and very low income population
- Households by tenure and HUD income ranges
- Poverty households by household type, race and ethnicity
- Distribution of Poverty households throughout Adams County
- Data tables and maps for income data as needed

Employment Status and Distress When Present

- Adams County labor force, employment, unemployment, and jobs by industry trends
- Data tables and maps as needed

Housing Profile

- Number of housing units by age, condition, and affordability
- Housing price trends analysis
- Number of new units produced in Adams County and building trends
- Special needs, homeless, and affordable housing inventory and gap analysis
- Foreclosure trends and market impacts
- Housing needs by tenure, income range and location
- Data tables and maps as needed

Evaluation of Fair Housing Legal Status

CSI will also research Fair Housing Complaints and compliance reviews, Fair Housing discrimination suits filed, research discrimination and illegal practices, other issues and problems, and provide an analysis of findings and trends, as well as instances of discrimination with regard to housing for persons in protected classes.

Identification of Impediments in Adams County

In order to determine what impediments exist in Adams County and the effect of Fair Housing programs that exist within the community, interviews to gather input regarding Fair Housing issues will be held with:

- Local government agencies in local jurisdictions and throughout Adams County, including Housing and Community Development Services staff, social services staff, code officials, and planning staff
- Community and business organizations
- Banks and mortgage loan companies
- Real Estate agents , South Metro Board of Realtors
- Non-profit housing, homeless, and special needs service providers
- Educational institutions
- Police department
- Adams County Social Services Department
- Colorado Civil Rights Division

- For profit housing developers
- Special needs and interest groups
- Adams County Housing Authority and other jurisdictional housing authorities
- Neighborhood Committees
- Neighborhood Task Forces
- Other local coalitions of agencies or neighbors

Those agencies that were consulted and participated in the 2007 Analysis of Impediments will be contacted, as well as any new agency serving households in Adams County.

CSI will contact members of the real estate, lending, and property management industries in Adams County to assess realty, leasing, and lending practices, particularly as they relate to Fair Housing. Realtors, bankers, and property managers who work within the County will be asked questions about Fair Housing lending practices, the availability of affordable, safe decent housing units within the County, Fair Housing training for lenders and realtors, CRA activities, and the presence of NIMBY and discrimination.

CSI will prepare an internet based survey that will be sent to as many service providers, agencies serving low income populations in Adams County, the real estate, lending and property management industry members as possible. This survey will be done in coordination with phone interviews to identify impediments and input regarding the success of recent efforts to reduce impediments identified in the 2007 Analysis of Impediments. Results of the survey will be presented in the final report and used to create an analysis of remaining or new impediments.

CSI pay specific attention to gathering input and feedback regarding the success of strategies identified in the 2007 Analysis of impediments.

CSI will conduct an analysis of possible impediments in both the public and private sector, for Adams County, and the seven incorporated areas, including:

Land Use Policy, Zoning and Site Location Analysis

- Assess how codes, laws and ordinances affect location, availability and accessibility of housing and employment
- Review public policies and procedures involving housing
- Review zoning and land use, tax assessment/abatements

Public and Private Sector

- Assess private sector practices affecting fair housing, including conducting a lending practices review (HMDA Data), and CRA housing investment review and opportunities evaluation
- Research public and subsidized housing providers, their efforts to promote fair housing, and patterns of occupancy
- Review how affordability of housing affects fair housing
- Review affirmative fair housing marketing practices and enforcement
- Determine if there is discrimination by the private or public sector

- Determine gaps in Fair Housing Programs offered in Adams County
- Occupancy requirements that unlawfully might limit group homes for persons with disabilities or families with children
- Efforts to serve residents with limited English proficiency

Public Participation/Public Outreach and Community Input

CSI will conduct key informant interviews with housing related organizations, community service organizations, advocacy groups, and industry groups and members to gather information for the above analysis. In addition, two public forums and two focus groups with agencies and industry partners, as well as affected citizens, will be held with affordable housing residents and community residents, the elderly, persons with disabilities, and other protected classes to seek their input related to impediments to Fair Housing and to discuss local barriers to affordable housing and fair housing issues in Adams County. CSI will market the two focus groups to local agencies serving these populations, and will include all input from the meetings in the final AI report.

The forums/focus groups will be held on different days, with a mix of daytime and evening gatherings at locations chosen by the County that allow access by public transit, for persons with disabilities, seniors, and other special needs populations. The first forum will be held to review preliminary data collected for the AI, and to gather feedback from residents related to housing barriers and discrimination. A second forum will be held to review the draft plan and which will meet the HUD required public hearing requirements for an AI. CSI Directors will be present to facilitate the forums and gather written and oral perceptions from residents regarding housing prices, conditions, locations, and availability, service enriched housing, and gaps in the housing inventory, as well as discrimination experienced by special needs, minority, and low income residents of the MSA when seeking housing.

CSI will also work with county staff to develop a system to gather additional written information from citizens wishing to make public comment during the development of the analysis. This system will include posting notices on the County website and local community newspapers asking for input, posting notices at senior facilities and properties targeting low income and disabled households, and through other channels identified by CSI and county staff. All public comments will be incorporated into the draft AI Study, and will follow the County's Public Participation Plan and HUD requirements. The public will have the opportunity to comments on the Draft Plan during a 30 day review period, before submittal to HUD of the final Analysis of Impediments to Fair Housing Choice.

Fair Housing Action Plan and Implementation Strategy

Information gathered from the industry expert interviews, focus groups, and community forums, will be used along with demographic, economic and housing data, local government and private sector research, and survey findings to develop a status statement of fair housing choice in the community, and a specific fair housing strategy for the County. This strategy will include recommendations to overcome continued or

newly identified barriers to housing choice and suggest ways to help Adams County meet its overall housing and economic development goals.

The strategy will include each identified impediment, actions needed to eliminate the impediment, the agencies or partners who will work on the action, and a timeline for action. Recommendations for action will take past efforts and achievements into consideration, making modifications when necessary or possibly recommending new strategies for reducing each barrier.

The final work product will be a complete Analysis of Impediments to Fair Housing Choice, which follows HUD guidelines and is accepted at the Region 8 HUD office.

Draft Study and Public Comment

CSI will work with Adams County staff to prepare a notice for publication that the draft Analysis of Impediments study is available for public comment, following HUD public notification requirements for publication and notification timeline, and to incorporate any feedback into the final Study.

Schedule

b. Project Timeline

CSI proposes the following work schedule, which assumes a July 14th project start date. The schedule can be adjusted if a contract is not executed by June 30th, 2014. The timeline can be adjusted during negotiations. CSI plans to meet the timeline laid out in the RFP, and is used to producing planning documents for HUD within tight timeframes.

Calendar	July	Aug	Sept
Analysis of Impediments Calendar:			
Kick off meeting	■		
Review past reports	■		
Demographic, Income, Employment, Housing Analysis	■	■	
Collect information Regarding Special Needs Groups	■	■	
Lender, Realtor, Provider Survey		■	■
Assessment of Fair Housing Complaints		■	■
Identification of Impediments		■	
Interviews/focus groups		■	
Production of Draft Report			■
Delivery of Draft Report			
30 Day Public Review Period, Edits to Draft AI			
Delivery of Final Analysis of Impediments report			
Calendar	Oct	Nov	Dec
Analysis of Impediments Calendar:			
Kick off meeting			
Review past reports			
Demographic, Income, Employment, Housing Analysis			
Collect information Regarding Special Needs Groups			
Lender, Realtor, Provider Survey			
Assessment of Fair Housing Complaints			
Identification of Impediments			
Interviews/focus groups			
Public Forums			
Production of Draft Report	■	■	
Delivery of Draft Report		■	
30 Day Public Review Period, Edits to Draft AI		■	■
Delivery of Final Analysis of Impediments report			■

Presentation to the Board of Commissioners at a Public Hearing

CSI's Directors will present the report data, data trends, future housing demand, finding and conclusions to the Board of Commissioners, using a PowerPoint presentation and handouts identifying key data and findings. CSI will be prepared to answer questions from Commissioners or the public, and provide feedback on recommendations outlined in the action plan.

5. Pricing**a) Delineation of Costs Between Study, Independent Budgets and Cost Savings**

CSI proposes to produce both the Housing Needs Assessment and the Analysis of Impediments to Fair Housing Choice Study. Our pricing schedule reflects a price for each report individually, and then provides a fee for producing both full priced studies, which allows for cost savings.

COST TO COMPLETE THE FULL HOUSING NEEDS ASSESSMENT

Adams County Housing Needs Assessment Projected Budget	
Consulting Fees	\$34,500
Data Purchase	\$500
Total Project Budget	\$35,000

COST TO COMPLETE THE ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE STUDY

Adams County Analysis of Impediments Projected Budget	
Consulting Fees	\$25,800
Survey Subscription	\$200
Total Project Budget	\$26,000

DISCOUNT OFFERED FOR TWO STUDIES

CSI will offer a 5% discount off of the prices listed above if CSI is engaged to conduct both studies. This saving represents time saved developing and holding public forums. CSI will develop public forums that meet the needs and requirements of both studies if engaged for all tasks in this proposal.

COST TO COMPLETE ONLY THE IDIS HOUSING NEEDS AND MARKET ANALYSIS SECTIONS OF THE CONSOLIDATED PLAN

Adams County Housing Needs Assessment (MODIFIED) Projected Budget	
Total Project Budget	\$17,500

b) Payment Schedule

These prices will be fixed for 90 days. This fee would be payable in the following installments for both full reports:

- \$10,000 payable upon completion of kickoff interviews and meetings;
- \$10,000 payable upon delivery of report data,
- \$7,000 upon delivery of the draft Analysis of Impediments Study,
- \$7,000 upon delivery of the draft Housing Needs Assessment,
- balance payable upon presentation of final reports to the Board of Commissioners at a Public Hearing and delivery of final reports

W-9 Form

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

Name (as shown on your income tax return)
Community Strategies Institute, LLC
Business name/disregarded entity name, if different from above

Check appropriate box for federal tax classification:
☐ Individual/sole proprietor ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate
☒ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) **C**
☐ Other (see instructions) ▶

Exemptions (see instructions):
Exempt payee code (if any) _____
Exemption from FATCA reporting code (if any) _____

Address (number, street, and apt. or suite no.)
P.O. Box 140387
City, state, and ZIP code
Edgewater, CO 80214

Requester's name and address (optional)

List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note: If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number								
			-					


Employer identification number								
2	0	-	4	6	1	5	5	0 7

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. citizen or other U.S. person (defined below), and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. 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. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here Signature of U.S. person  Date **11/20/13**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. The IRS has created a page on IRS.gov for information about Form W-9, at www.irs.gov/w9. Information about any future developments affecting Form W-9 (such as legislation enacted after we release it) will be posted on that page.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, payments made to you in settlement of payment card and third party network transactions, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the

withholding tax on foreign partners' share of effectively connected income, and

4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct.

Note. If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

CONTRACTOR'S CERTIFICATION OF COMPLIANCE

Pursuant to Colorado Revised Statute, § 8-17.5-101, *et seq.*, as amended 5/13/08, as a prerequisite to entering into a contract for services with Adams County, Colorado, the undersigned Contractor hereby certifies that at the time of this certification, Contractor does not knowingly employ or contract with an illegal alien who will perform work under the attached contract for services and that the Contractor will participate in the E-Verify Program or Department program, as those terms are defined in C.R.S. § 8-17.5-101, *et seq.* in order to confirm the employment eligibility of all employees who are newly hired for employment to perform work under the attached contract for services.

CONTRACTOR:

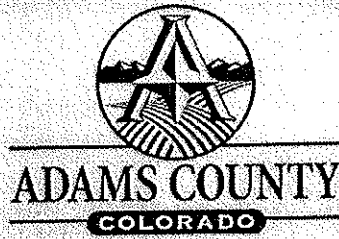
Community Strategies Institute 6/9/14
Company Name Date

Jennifer Rodgers
Name (Print or Type)

Jennifer Rodgers
Signature

Director
Title

Note: Registration for the E-Verify Program can be completed at: <https://www.vis-dhs.com/employerregistration>. It is recommended that employers review the sample "memorandum of understanding" available at the website prior to registering



PROPOSAL FORM
2014.139
2015-2020 Consolidated Plan

VENDOR'S STATEMENT

I have read and fully understand all the special conditions herein set forth in the foregoing paragraphs, and by my signature set forth hereunder, I hereby agree to comply with all said special conditions as stated or implied. In consideration of the above statement, the following proposal is hereby submitted.

Thirty Five Thousand Dollars (HWA - full)
~~Twenty Six Thousand Dollars (CAF)~~ \$35,000 / \$26,000 / \$17,500
 Written Amount Seventeen Thousand Five Amount
 Hundred Dollars (HWA modified)

WE, THE UNDERSIGNED, HEREBY ACKNOWLEDGE RECEIPT OF

Addenda # 1 (major PAF) Addenda # _____
 If None, Please write NONE.

Community Strategies Institute	
Company Name	Date
PO Box 140387	
Address	Signature
Edgewater, CO 80214	
City, State, Zip Code	Printed Name
USA	
County	Title
303 902 9028	
Telephone	Fax
tomhart1876@mhq.com	
E-mail Address	