



**BOARD OF SUPERVISORS AGENDA ITEM REPORT
CONTRACTS / AWARDS / GRANTS**

Award Contract Grant

Requested Board Meeting Date: 2/20/2018

* = Mandatory, information must be provided

or Procurement Director Award

***Contractor/Vendor Name/Grantor (DBA):**
Helm, Livesay & Worthington Ltd

***Project Title/Description:**
Legal Advice and Representation

***Purpose:**
Provide legal services in property tax appeal cases. Increase CT an additional \$50,000.00

***Procurement Method:**
Procurement Exempt - Exempt per Section 11.04.020

***Program Goals/Predicted Outcomes:**
Provide consistent legal services

***Public Benefit:**
Integrity of the assessment role

***Metrics Available to Measure Performance:**
Judges ruling

***Retroactive:**
Yes. Mis-communication on amendment to new hourly rate caused time delay. Attorney still currently working on pending matter.

*TO: COB 2-6-2018
Vers.: 14
PSS.: 2*

Procurement/02/06/18 MCOB

Contract / Award Information

Document Type: _____ Department Code: _____ Contract Number (i.e., 15-123): _____

Effective Date: _____ Termination Date: _____ Prior Contract Number (Synergen/CMS): _____

Expense Amount: \$* _____ Revenue Amount: \$ _____

***Funding Source(s) required:**

Funding from General Fund? Yes No If Yes \$ _____ % _____

Contract is fully or partially funded with Federal Funds? Yes No

***Is the Contract to a vendor or subrecipient?**

Were insurance or indemnity clauses modified? Yes No

If Yes, attach Risk's approval

Vendor is using a Social Security Number? Yes No

If Yes, attach the required form per Administrative Procedure 22-73.

Amendment / Revised Award Information

Document Type: CT Department Code: AS Contract Number (i.e., 15-123): 15-356

Amendment No.: 2 AMS Version No.: 14

Effective Date: 2-17-2018 New Termination Date: 2-16-2019

Prior Contract No. (Synergen/CMS): _____

Expense or Revenue Increase Decrease Amount This Amendment: \$ 50,000.00

Is there revenue included? Yes No If Yes \$ _____

***Funding Source(s) required:** General Fund

Funding from General Fund? Yes No If Yes \$ 50,000.00 % _____

Grant/Amendment Information (for grants acceptance and awards) Award Amendment

Document Type: _____ Department Code: _____ Grant Number (i.e., 15-123): _____

Effective Date: _____ Termination Date: _____ Amendment Number: _____

Match Amount: \$ _____ Revenue Amount: \$ _____

***All Funding Source(s) required:**

*Match funding from General Fund? Yes No If Yes \$ _____ % _____

*Match funding from other sources? Yes No If Yes \$ _____ % _____

*Funding Source: _____

***If Federal funds are received, is funding coming directly from the Federal government or passed through other organization(s)?**

Contact: Susan Shettleroe

Department: Assessor

Telephone: 724-2730

Department Director Signature/Date: [Signature]

Deputy County Administrator Signature/Date: _____

County Administrator Signature/Date: C. Danielberry
(Required for Board Agenda/Addendum Items)

2/5/18

Pima County Department of Assessor

Project: Legal Advice and Representation

Contractor: Helm, Livesay & Worthington Ltd

1619 E Guadalupe, Suite One, Tempe, AZ 85283

Contract No.: CT-AS-15-356

Contract Amendment No.: 2

CONTRACT	
NO. <u>CT-AS-15-356</u>	
AMENDMENT NO. <u>02</u>	
This number must appear on all invoices, correspondence and documents pertaining to this contract.	

(STAMP HERE)

Orig. Contract Term: 2/17/2015 – 2/17/2016
Termination Date Prior Amendment: 2/17/2018
Termination Date This Amendment: 2/16/2019

Orig. Amount:	\$ 50,000.00
Prior Amendments Amount:	\$ 50,000.00
This Amendment Amount:	\$ 50,000.00
Revised Total Amount:	\$150,000.00

CONTRACT AMENDMENT

The parties agree to amend the above-referenced contract as follows:

- 1. Term.** The Contract terminates on 2/16/2019.
- 2. Maximum Payment Amount.** The maximum amount the County will spend under this Contract, as set forth in Section III is increased by \$50,000.00. County's total payments to Contractor under this contract, including any sales taxes, will not exceed \$150,000.00.
- 3. Hourly Rate.** Hourly rate of Roberta Livesay, Esq. will increase from \$250.00 per hour for all legal services to \$260.00 per hour for all legal services.

The effective date of this Amendment is February 17, 2018.

All other provisions of the Contract not specifically changed by this Amendment remain in effect and are binding upon the parties. *Attorney rate increased to \$260 per hour. RLL*

PIMA COUNTY

CONTRACTOR

Chair, Board of Supervisors

Roberta S. Livesay

Authorized Officer Signature

Date

ROBERTA S. LIVESAY SHAREHOLDER
Printed Name and Title *HELM, LIVESAY &*
WORTHINGTON, LTD

1-29-2018

Date

ATTEST

Clerk of the Board

Date

APPROVED AS TO FORM

[Signature]

Deputy County Attorney

TOBIN ROSEN

Print DCA Name

1/23/18

Date