



BOARD OF SUPERVISORS AGENDA ITEM REPORT
CONTRACTS / AWARDS / GRANTS

☐ Award ☒ Contract ☐ Grant

Requested Board Meeting Date: October 15th, 2019

* = 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 in property tax appeal cases where the Assessor is the plaintiff

***Purpose:**

Legal advice and representation.

***Procurement Method:**

Selection of Contractor was pursuant to Pima County Procurement Code 11-04-020 (C) exemption

***Program Goals/Predicted Outcomes:**

Provide consistent legal services

***Public Benefit:**

Integrity of the assessment role

***Metrics Available to Measure Performance:**

Judges ruling in property tax appeal cases

***Retroactive:**

No

Procure Dept 09/30/19 PM08:47

To: CoB - 9.30-19
Ver. - 21
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(1)

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**If Yes, 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): 15-356Amendment No.: 4 AMS Version No.: 21Effective Date: 10/15/2019 New Termination Date: _____

Prior Contract No. (Synergen/CMS): _____


☒ Expense or ☐ Revenue ☒ Increase ☐ Decrease Amount This Amendment: \$ 50,000.00Is there revenue included? ☐ Yes ☒ No If Yes \$ _____***Funding Source(s) required:** GeneralFunding from General Fund? ☒ Yes ☐ No If Yes \$ _____ % 100**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 ShettleroeDepartment: Assessor Telephone: 724-2730Department Director Signature/Date: 

Deputy County Administrator Signature/Date: _____

County Administrator Signature/Date:  9/27/2019*(Required for Board Agenda/Addendum Items)*

Pima County Department of Assessor

Project: Legal Advice and Representation

Contractor: Helm, Livesay & Worthington Ltd

Contract No.: CT-AS-15-356

Contract Amendment No.: 4

Orig. Contract Term: 02/17/2015 – 2/17/2016	Orig. Amount:	\$ 50,000.00
Termination Date Prior Amendment: 02/16/2020	Prior Amendments Amount:	\$100,000.00
Termination Date This Amendment: 02/16/2020	This Amendment Amount:	\$ 50,000.00
	Revised Total Amount:	\$200,000.00

CONTRACT AMENDMENT

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

1. Background and Purpose.

1.1. Background. On February 17, 2015, County and Contractor entered into the above referenced agreement to provide legal advice and representation in property tax appeal cases where the Assessor is the plaintiff.

2. Maximum Payment Amount. The maximum amount the County will spend under this Contract, as set forth in Article III, is increased by \$50,000.00. County's total payments to Contractor under this contract, including any sales taxes, will not exceed \$200,000.00.

3. Israel Boycott Certification. Pursuant to A.R.S. § 35-393.01, if Contractor engages in for-profit activity and has 10 or more employees, and if this Contract has a value of \$100,000.00 or more, Contractor certifies it is not currently engaged in, and agrees for the duration of this Contract to not engage in, a boycott of goods or services from Israel. This certification does not apply to a boycott prohibited by 50 U.S.C. § 4842 or a regulation issued pursuant to 50 U.S.C. § 4842.

The effective date of this Amendment is October 15th, 2019.

All other provisions of the Contract not specifically changed by this Amendment remain in effect and are binding upon the parties.

PIMA COUNTY

Chairman, Board of Supervisors

Date

CONTRACTOR


Authorized Officer Signature

ROBERTA S. LIVESAY, PRES
Printed Name and Title

9-4-2019
Date

ATTEST

Clerk of the Board

Date


APPROVED AS TO FORM


Deputy County Attorney

KELL OLSON
Print DCA Name

9/23/19
Date

APPROVED AS TO CONTENT


Bill Staples, Pima County Assessor

9/27/19
Date