



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

☐ Award ☒ Contract ☐ Grant

Requested Board Meeting Date: March 2, 2021

**\* = 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 for Bill Staples, Pima County Assessor

**\*Purpose:**

Contractor will continue to represent Bill Staples, Pima County Assessor, in property tax appeal cases where the Assessor is the plaintiff.

**\*Procurement Method:**

Legal services for pending or anticipated litigation are exempt under Procurement Code 11.04.020(c).

**\*Program Goals/Predicted Outcomes:**

Contractor will continue to represent Bill Staples, Pima County Assessor, in property tax appeal cases where the Assessor is the plaintiff.

**\*Public Benefit:**

Contractor will continue to represent Bill Staples, Pima County Assessor, in property tax appeal cases where the Assessor is the plaintiff.

**\*Metrics Available to Measure Performance:**

Contractor will invoice County on a monthly basis unless a different billing period is set forth. County must receive invoices no more than 30 days after the end of the billing period in which Contractor delivered the invoiced products or services to County.

**\*Retroactive:**

Yes. There were delays in processing.

TO: COB 2-16-2021  
Vers.: 5  
pgs.: 2

**Contract / Award Information**

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

Commencement 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 22-10.***Amendment / Revised Award Information**Document Type: CT Department Code: AS Contract Number (i.e.,15-123): 20\*244Amendment No.: 3 AMS Version No.: 5Commencement Date: 2/17/2021 New Termination Date: 8/16/2021

Prior Contract No. (Synergen/CMS): \_\_\_\_\_

☒ Expense or ☐ Revenue ☒ Increase ☐ Decrease Amount This Amendment: \$ 25,000.00Is there revenue included? ☐ Yes ☒ No If Yes \$ \_\_\_\_\_**\*Funding Source(s) required:** General Fund - AssessorFunding from General Fund? ☐ Yes ☒ No If Yes \$ \_\_\_\_\_ % \_\_\_\_\_**Grant/Amendment Information** (for grants acceptance and awards) ☐ Award ☐ Amendment

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

Commencement 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: Marilee WestonDepartment: PCAO Civil Division - BTU Telephone: (520) 724-8274Department Director Signature/Date: Andrew L. Flagg 2/9/2021

Deputy County Administrator Signature/Date: \_\_\_\_\_

County Administrator Signature/Date: C. DeCubellis 2/10/21  
(Required for Board Agenda/Addendum Items)

**Pima County Attorney's Office**

**Project: Legal Advice and Representation for Bill Staples, Pima County Assessor**

**Contractor: Helm, Livesay & Worthington, Ltd.**  
419 E. Juanita Ave  
Bldg 103, Ste One  
Mesa AZ 85204

**Contract No.: CT-AS-20\*244-03**

**Contract Amendment No.: 3**

<b>Orig. Contract Term:</b> 2/17/2020 – 2/16/2021	<b>Orig. Amount:</b>	\$ 50,000.00
<b>Termination Date Prior Amendment:</b> 2/16/2021	<b>Prior Amendments Amount:</b>	\$ 50,000.00
<b>Termination Date This Amendment:</b> 8/16/2021	<b>This Amendment Amount:</b>	\$ 25,000.00
	<b>Revised Total Amount:</b>	\$125,000.00

**CONTRACT AMENDMENT # 3**

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

**1. Background and Purpose.**

1.1. Background. On February 17, 2020, County and Contractor entered into the above referenced agreement to provide representation for Bill Staples, Pima County Assessor, in property tax appeal cases where the Assessor is the plaintiff. Current Assessor, Suzanne Droubie, replaces Mr. Staples as the Plaintiff.

1.2. Purpose. Additional funds and time are required to continue the legal representation of the Assessor.

**2. Term.** The parties agree to extend the contract term for six months commencing on February 17, 2021 and terminating on August 16, 2021. If the commencement date is before the Effective Date of this amendment, the parties will, for all purposes, deem the amendment to have been in effect as of the commencement date.

**3. Maximum Payment Amount.** The maximum amount the County will spend under this Contract, as set forth in Section 5.2 is increased by \$25,000.00. County's total payments to Contractor under this contract, including any sales taxes, will not exceed \$125,000.00.

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

**PIMA COUNTY**

\_\_\_\_\_  
Chair, Board of Supervisors

\_\_\_\_\_  
Date

**CONTRACTOR**

  
Authorized Officer Signature

ROBERTA S. LIVESAY  
Printed Name and Title

2-11-2021  
Date

**ATTEST**

\_\_\_\_\_  
Clerk of the Board

\_\_\_\_\_  
Date

**APPROVED AS TO FORM**

  
\_\_\_\_\_  
Deputy County Attorney

Regina L. Nassen  
Print DCA Name

2/3/21  
Date

**APPROVED AS TO CONTENT**

Andrew L. Flagg  
\_\_\_\_\_  
Andy Flagg, Chief Civil Deputy Attorney

2/5/2021  
Date