

**SAN MIGUEL REGIONAL HOUSING AUTHORITY
AGREEMENT FOR PROFESSIONAL SERVICES
Independent Contractor**

PROJECT: 2024 Housing Needs Assessment

CONTRACTOR NAME: Economic & Planning Systems, Inc. (EPS)

LOCATION: 730 17th Street; Suite 630; Denver, CO 80220 | 303-623-3557

San Miguel County Regional Housing Authority (SMRHA) wishes to engage the services of an independent contractor for professional services. The undersigned contractor ("Contractor") has agreed to provide such services, as an independent contractor, in return for the compensation stated herein. Contractor has read and agrees to the terms and conditions stated herein.

BE IT AGREED AS FOLLOWS:

1. **CONTRACT DOCUMENTS.** The "Contract Documents" shall consist of the following:
 - a) this Agreement;
 - b) the Bid/RFP Package (if applicable);
 - c) the Statement of Work as Exhibit A;
 - d) Certificate of Insurance and Endorsement as Exhibit B; and
 - e) Contractor's W-9 as Exhibit C; and
2. **DESCRIPTION OF SERVICES.** Contractor warrants that it is fully qualified to perform the below-described Services and shall perform the Services following generally recognized professional practices and standards of Contractor's profession, to the reasonable satisfaction of SMRHA, and in strict accordance with the provisions of the Contract Documents. No adjustment or modification of the Contract Documents shall be allowed for any misunderstanding of the Services or of the terms and provisions contained in the Contract Documents. Services shall include: **Housing Needs Assessment and Strategy**
3. **COMPENSATION.** SMRHA agrees to pay **\$94,730**.

Invoices must be submitted to and approved by the SMRHA Representative designated in the "Authorized Representative" paragraph herein and delivered to the SMRHA Office. Approved invoices that are received by the SMRHA Office before the 1st day of the month will be paid within thirty (30) days. Payment of invoices does not constitute final acceptance of work, nor shall it be construed as a waiver by SMRHA of any of its rights as may be provided by law.

Contractor represents and warrants that the prices, charges, or fees outlined in this Agreement (on the whole) are at least as favorable as the prices, charges, or fees Contractor charges (on the whole) to other of its customers/clients for the same or substantially similar services provided under the same or similar circumstances, terms, and conditions. If Contractor agrees or contracts with other customers/clients similarly situated during the term of this Agreement, and offers or agrees to a financial term more favorable than those set forth herein (on the whole), Contractor agrees that it will reduce the prices, charges, or fees charged to SMRHA concerning the products/services hereunder to the most favorable rates received by those other customers/clients.

4. **TERM OF AGREEMENT.** The term of this Agreement expires **12/31/2024**.
5. **AUTHORIZED REPRESENTATIVES.** SMRHA designates **Courtney McEleney** as the SMRHA Representative under this Agreement. Contractor designates **Brian L. Duffany, Principal** as the Contractor Representative. Said Representatives shall have the authority to bind the parties concerning the Services. The SMRHA Representative shall be present at the worksite and/or review Contractor's work as necessary to assure

the Contractor's satisfactory performance under this Agreement. The Contractor Representative shall also be responsible for advising the SMRHA Representative of the status of the Services and agrees to take direction only from the SMRHA Representative and to comply promptly and fully with the reasonable requests and directives issued by the SMRHA Representative from time to time. SMRHA may change its representative at any time by giving Notice to Contractor as set forth herein. Contractor shall not replace the Contractor Representative unless: (a) SMRHA requests a replacement or (b) Contractor terminates the employment of the Contractor Representative and provides a satisfactory substitute. SMRHA must approve the substitute Contractor Representative, and, if no substitute is acceptable, SMRHA may terminate this Agreement.

6. **APPROVAL & ACCEPTANCE OF SERVICES.** The SMRHA Representative shall be the sole judge of the acceptability of the Services by the Contractor and the sufficiency of any supporting data submitted by the Contractor. If at the sole discretion of SMRHA conferences with Contractor are necessary or desirable to explain or correct Services, Contractor shall make no additional charge for time or costs for attendance as such conference or for making the required explanations or corrections.
7. **INDEPENDENT CONTRACTOR.** Contractor shall perform its duties hereunder as an independent contractor and not as an employee. Neither Contractor nor any employee of Contractor shall be deemed to be an employee or agent of SMRHA. Contractor and its employees are not entitled to unemployment insurance or workers' compensation benefits through SMRHA and SMRHA shall not pay for or otherwise provide such coverage. Contractor shall be responsible for all employment taxes, income taxes, or other taxes incurred in performing this Contract. Contractor shall provide and keep in force workers' compensation and unemployment compensation insurance in the amounts required by law, and provide proof thereof when requested, and to be solely responsible for its acts and those of its employees and agents. The Services as defined herein, are subject to SMRHA's right of inspection and approval. Contractor may practice their profession for others during periods when not performing work under this Agreement for SMRHA. SMRHA may, during the term of this Agreement, engage other independent contractors to perform the same or similar work that the Contractor performs.
8. **WORK PERFORMED AT CONTRACTOR'S RISK.** Contractor warrants that it is fully qualified to perform the Services as set forth herein and shall perform the Services following the professional standards of the industry and in strict accordance with the provisions of the Contract Documents. Contractor shall take all precautions necessary and shall be responsible for the safe performance of the services described herein. All work shall be done at Contractor's risk. Contractor shall be responsible for any damage or loss to SMRHA property used or held for use in connection with the work performed.
9. **PROFESSIONAL LIABILITY INSURANCE & LICENSURE.** Contractor shall purchase and maintain Professional Liability (Errors and Omissions Liability) insurance coverage, from a company or companies licensed to do business in the State of Colorado, as of the effective date of this Agreement and shall be maintained for the duration of this Agreement. Contractor shall also maintain any professional licensure or certifications as required by law during the term of this Agreement. The minimum amount of said insurance coverage shall be commensurate with the risks of services provided under this Agreement to protect them from claims which may arise out of or result from operations under this Agreement, whether such operations be by themselves or by any subcontractor or by anyone directly or indirectly employed by any of them, or by anyone whose acts any of them may be liable. Contractor shall provide a copy of their valid professional license/certification and professional liability insurance coverage prior to commencing the Services under this Agreement and during the term of this Agreement shall provide SMRHA written evidence of continuing insurance coverage within three (3) business days upon request from SMRHA.
10. **GOVERNMENTAL IMMUNITY.** SMRHA does not intend to waive, by any provision of this Agreement, any rights, immunities, and protections provided by the Colorado Governmental Immunity Act, C.R.S. §24-10-101, *et seq.*, as currently in effect and as it may be subsequently amended. This immunity continues beyond the termination of this Agreement for the acts or omissions which occurred during the Agreement Term.
11. **INDEMNIFICATION.** Contractor shall indemnify, release, save, hold harmless and defend SMRHA, its officials, employees, and agents from and against all liabilities, claims, actions, damages, losses, and expenses,

including without limitation reasonable attorney's fees and costs (hereinafter referred to collectively as "claims") for bodily injury or personal injury, including death, or loss or damage to tangible or intangible property caused, or alleged to be caused, in whole or in part, by the negligent or willful acts or omissions of the Contractor or any of its owners, officers, directors, agents, employees, or subcontractors. The indemnity includes any claim or amount arising out of or recovered under the Workers' Compensation Law or arising out of the failure of such Contractor to conform to any federal, state, or local law, statute, ordinance, rule, regulation, or court decree. It is the specific intention of the parties that SMRHA shall, in all instances, except for claims arising solely from the negligent or willful acts or omissions of SMRHA, be indemnified by Contractor from and against any and all claims. It is agreed that Contractor will be responsible for primary loss investigation, defense, and judgment costs where this indemnification is applicable. In consideration of the award of this Agreement, the Contractor agrees to waive all rights of subrogation against SMRHA, its officials, agents, and employees for losses arising from the work performed by the Contractor for SMRHA according to this Agreement. Notwithstanding any other provision of the Contract Documents, Contractor acknowledges that SMRHA, as a governmental entity, is not legally permitted to and does not agree to indemnify Contractor.

12. **APPROPRIATION OF FUNDS.** Time is of the essence in Contractor's performance of its obligations under this Agreement. SMRHA's expenditure of any funds under this Agreement beyond the current SMRHA fiscal year (January 1 -- December 31) shall be expressly subject to and contingent upon SMRHA's budgeting and appropriating funds for such purposes according to the Colorado Local Government Budget Law and C.R.S. § 29-1-110. Should such funds not be budgeted and appropriated for SMRHA's obligations under this Agreement for future fiscal years, this Agreement shall terminate at the end of the fiscal year for which such funding has been lawfully budgeted and appropriated, and SMRHA shall provide the contractor with prior written notice of such termination. Such cancellation shall not impose any penalty against SMRHA in the event of a failure to appropriate sufficient funds.
13. **SUSPENSION & TERMINATION.** Without terminating this Agreement, SMRHA may suspend Contractor's Services following a five (5) day written Notice to Contractor. In the event of a suspension, Contractor shall incur no additional expenses and shall perform no further services for SMRHA under this Agreement after the date of receipt of the notice of a suspension unless otherwise specified by SMRHA. If the resumption of Contractor's Services requires any waiver or change in this Agreement, the parties must mutually agree to such waiver or change, in writing, and the writing must be attached as an addendum to this Agreement. Additionally, SMRHA reserves the right to terminate this Agreement, in whole or in part, with or without cause by giving a fifteen (15) day written Notice to Contractor. In the event of termination, Contractor shall incur no additional expenses and shall perform no further services for SMRHA under this Agreement after the date of receipt of the notice of termination, unless otherwise specified by SMRHA. Upon termination for any reason, SMRHA shall be entitled to a prorated refund for the remainder of the current term. In the event SMRHA terminates this Agreement for cause, the provisions of the paragraph titled "Damages" shall apply.
14. **DAMAGES.** If Contractor fails to comply with any material provision of the Agreement, Contractor shall be liable for any and all damages, including with limitation, the cost of procuring similar supplies or services and all other costs and expenses incurred by SMRHA because of such failure. All time limits stated in the Agreement are of the essence. Contractor's failure to substantially complete the services in conformance with the Agreement shall result in damages suffered by SMRHA, including, without limitation, SMRHA's cost to complete the services together with any other expenses incurred, as determined by SMRHA. SMRHA may offset any amounts owed to it as damages against any monies due and owing to Contractor under this Agreement. In addition, SMRHA shall be entitled to any other rights and remedies available to it in law or equity.
15. **DATA SECURITY.** During the course of Contractor's performance of the Work, the Contractor may be required to store or control the transmission of electronic data provided by SMRHA ("SMRHA Data"). The Contractor represents and warrants that:
 - a. It will take all reasonable precautions to maintain all SMRHA Data in a secure environment to prevent unauthorized access, use, or disclosure, including industry-accepted firewalls, up-to-date anti-virus software, and controlled access to the physical location of the hardware containing SMRHA Data;

- b. Its collection, access, use, storage, disposal, and disclosure of SMRHA Data shall comply with all applicable data protection laws, as well as all other applicable regulations and directives;
- c. It will notify SMRHA of any actual or suspected data security incident as soon as practicable, but no later than 24 hours after it becomes aware of it;
- d. The Contractor will provide SMRHA with sufficient information for SMRHA to satisfy its legal and regulatory notice obligations; and
- e. It will promptly return or destroy any SMRHA Data upon request from SMRHA Representative.

Contractor's indemnification obligations identified elsewhere in this Contract shall apply to any breach of the provisions of this Paragraph.

16. **NONDISCRIMINATION.** Contractor agrees to comply with the letter and spirit of the Colorado Anti-Discrimination Act, C.R.S. § 24-34-401, et seq., as amended, and all applicable local, state, and federal laws regarding discrimination and unfair employment practices. Contractor shall not refuse to hire, discharge, promote or demote, or discriminate in matters of compensation against any person otherwise qualified solely because of race, color, creed, religion, gender, gender identity, national origin or ancestry, disability, age, sex, sexual orientation, socio-economic status, marital status, veteran status, or any other basis prohibited by federal, state or local law.
17. **COLORADO LABOR PREFERENCE.** The provisions of C.R.S. §§ 8-17-101 and 102 may apply to this Agreement. If this Agreement includes federal funds, this paragraph does not apply. If the work to be performed under this Agreement falls within the definition of a "public works project," then the Colorado Labor Preference applies. Colorado labor must be employed to perform the work to the extent of not less than eighty percent (80%) of each type or class of labor in the several classifications of skilled and common labor employed on the project. "Colorado labor" means any person who is a resident of the State of Colorado at the time of the public works project, without discrimination as to race, color, creed, sex, age, or religion except when sex or age is a bona fide occupation qualification. A resident of the State of Colorado is a person who can provide a valid Colorado driver's license, a valid Colorado state-issued photo identification, or documentation that they have resided in Colorado for the last thirty (30) days.
18. **COLORADO OPEN RECORDS ACT.** The parties acknowledge that SMRHA is a governmental entity formed according to Colorado law, and as such, is subject to the Colorado Open Records Act, C.R.S. § 24-72-200 *et seq.* ("CORA"). In the event SMRHA receives a request under CORA that would require the production of records related to Contractor, SMRHA will inform Contractor of such a request and provide Contractor with a copy of any such written request. Contractor shall promptly notify SMRHA if: (a) production of the requested record would disclose Contractor's trade secrets, privileged information, and/or confidential commercial or financial data pursuant to C.R.S. § 24-72-204(3)a(IV) or; (b) Contractor desires to pursue a legal action to prevent disclosure of such documents. SMRHA shall determine whether to deny the request. If SMRHA's denial of a request is challenged, SMRHA will notify Contractor of such a challenge and provide the Company with a written copy of any such challenge. Contractor shall indemnify and hold SMRHA harmless from any claim or judgment as well as any costs and attorney's fees incurred in denying such request or otherwise assisting Contractor in response to a denial and/or legal challenge to the denial.
19. **COMPLIANCE WITH FEDERAL AND STATE HEALTH INFORMATION PRIVACY LAWS.** Contractor and their employees, agents, and subcontractors shall comply with HIPAA and any State health information privacy laws, to the extent they are applicable.
20. **GOVERNING LAW, JURISDICTION & VENUE.** The rights and duties of the parties under this Agreement shall be governed by the laws of the State of Colorado, excluding its conflicts of law provisions. The courts of the State of Colorado shall have sole and exclusive jurisdiction of any disputes or litigation arising under the Software Agreement. Venue for any and all legal actions arising hereunder shall lie in the District Court in and for the County of San Miguel, State of Colorado.
21. **DISPUTE RESOLUTION:** SMRHA does not agree to binding arbitration by any extra-judicial body or person or nor does SMRHA intend to waive its right to a jury trial.

22. **WARRANTY.** Contractor represents that the Services pursuant to the Contract Documents will be performed in accordance with industry standards in all material respects.
23. **NOTICE.** Notice under this Agreement shall be given in writing and shall be deemed received if given by: (a) confirmed electronic transmission (as defined below) when transmitted, if transmitted on a business day and during the normal business hours of the recipient, and otherwise on the next business day following transmission; (b) certified mail, return receipt requested, postage prepaid, three (3) business days after being deposited in the United States mail; or (c) overnight carrier service or personal delivery when received. Notice shall be given to the parties at the following addresses:

SMRHA Representative:

Contractor Representative:

Name:	Courtney McEleny	Name:	Brian L. Duffany
Title:	Executive Director	Title:	Principal
Mailing Address:	PO Box 840 Telluride, CO 81435	Mailing Address:	Economic & Planning Systems 730 17 th Street; Suite 630 Denver, CO 80220
Physical Address (if different)	820 Black Bear Rd G-17 Telluride, CO 81435	Physical Address (if different)	
Phone:	970-728-3034 Ext. 4	Phone:	303-623-3557
Email:	courtney@smrha.org	Email:	bduffany@epsdenver.com

“Electronic Transmission” means any form of communication not directly involving the physical transmission of paper that creates a record that may be retained, retrieved, and reviewed by a recipient thereof, and that may be directly reproduced in paper form by such a recipient through an automated process, but specifically excluding facsimile transmissions and texts. The parties agree that: (a) any notice or communication transmitted by electronic transmission shall be treated in all manner and respects as an original written document; (b) any such notice or communication shall be considered to have the same binding and legal effect as an original document, and; (c) at the request of either party, any such notice or communication shall be re-delivered or re-executed, as appropriate, by the party in its original form.

24. MISCELLANEOUS.

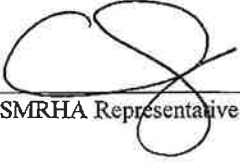
- a. **Assignability.** Contractor shall not assign its rights or delegate its obligations under this Agreement without SMRHA’s prior written consent.
- b. **Severability.** Should a court of competent jurisdiction determine that any provision or term of this Agreement be legally void or otherwise legally unenforceable, such provision or term shall be deemed severable from the remainder of this Agreement, which shall remain in full force and effect.
- c. **Officials Not to Benefit.** No elected or employed member of SMRHA’s government shall be paid or receive, directly or indirectly, any share or part of this Agreement or any benefit that may arise therefrom.
- d. **Conflict of Interest.** Contractor shall not knowingly perform any act that would conflict in any manner with the performance of services under this Agreement. Contractor certifies that it is not engaged in any current project or business transaction, directly or indirectly, nor has any interest, direct or indirect, with any person or business that might result in a conflict of interest in the performance of services.
- e. **Records Retention.** Contractor shall maintain all records, including working papers, notes, and financial records, and make them available for SMRHA inspection and audit which they may require for any purpose authorized by law.
- f. **Entire Agreement.** This Agreement, together with any attached exhibits, represents the complete, integrated, and merged understanding of the parties with regard to the subject matter of this Agreement, and any prior or contemporaneous provision, term, condition, promise, representation, or understanding, shall be of no legal force or effect unless embodied herein in writing, or in a written amendment to this Agreement mutually agreed to and executed by the parties. A party’s waiver of a specific right set forth

herein shall not be deemed to be a waiver by that party of any other of its rights contained in this Agreement. In the event of a conflict between an Exhibit to this Agreement and the body of this Agreement, the Agreement will govern the resolution of the conflict.

- g. Execution by Counterparts: Electronic Signatures. This Agreement may be executed in two or more counterparts, each of which shall be deemed an original, but all of which shall constitute one and the same instrument. The parties approve the use of electronic signatures for the execution of this Agreement. All use of electronic signatures shall be governed by the Uniform Electronic Transactions Act, C.R.S. §24-71.3-101 et seq.

IN WITNESS WHEREOF, the parties have executed and entered into this Agreement as of the latter day and year indicated below.

SAN MIGUEL REGIONAL HOUSING AUTHORITY


SMRHA Representative Signature

Executive Director
Title

03/22/24
Date

CONTRACTOR	Name: Brian L. Duffany Title: Principal Address: 730 17th Street; Suite 630 Denver, CO 80220 Phone: 303-623-3557 Email: bduffany@epsdenver.com
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Contractor Representative Signature

Principal
Title

04/03/2024
Date


Principal

4/3/24

Revised Draft Scope of Work

Approach

The San Miguel County Regional Housing Authority (SMRHA), San Miguel County, the Town of Telluride, and the Town of Mountain Village (Project Partners) are sponsoring a Housing Needs Assessment (HNA) to document conditions and changes in housing conditions and demand in the County. The purpose of the work is to provide relevant information and strategy recommendations to each jurisdiction to inform their housing strategies and policies specific to their jurisdictions.

The Scope of Work described below aims to strike a balance between thoroughness and cost. There are three main components to the work described in the tasks outlined below.

- **Survey** – A survey is needed to obtain information on housing preferences from residents and in-commuters. American Community Survey Data (ACS) has limitations in this application. The survey will ask questions on housing security and costs, commuting patterns, demographics, and preferences. The questions will also address community and location and housing unit preferences. This information will help identify what is needed to bring people back to San Miguel County who have been displaced by high costs or moved by choice.
- **Market and Demographic/Economic Data** – Secondary data (published State and Federal data sources) will be used to document changes in economic, population, other demographic, and housing market trends and conditions. Comparisons will be made between San Miguel County communities and the surrounding region (Montrose and Ouray Counties primarily).
- **Strategies and Recommendations** – The survey and data analysis will be used to identify how housing gaps have changed since before the pandemic and the previous study, and the preferences and housing needs for residents and in-commuters. From there, we will work with the Project Partners to identify the major strategy areas needed to achieve their desired housing outcomes.

Work Plan

The tasks needed to accomplish the work and deliver a HNA are outlined below. The Work Plan outlines the major activities we expect to complete. The specific details (data sources, types of analyses, etc.) may shift as we learn more about housing and economic conditions over the course of the work.

Task 1. Kick Off, Data Collection, and Project Management

- Kick off Meeting – Initial meeting to officially begin work and establish contacts for local data collection, and to begin discussing survey design and distribution logistics.
- Housing Goals – During the kickoff meeting or subsequent check-in call, hear input from each Project Partner on their housing goals and desired outcomes from the HNA.
- Data Collection – Prepare a data request and assign contact people within the Project Partners.
- Schedule regular check in meetings with SMRHA's project lead.

Task 2. Survey Design

First, we need to discuss the optimal times to distribute the survey. Winter (March) and Summer (July-August) are the best times to capture peak season conditions. It is not feasible however to design and distribute a survey within March 2024.

EPS and RRC will prepare an initial rough draft survey to review with the Project Partners. We will begin by reviewing the 2018 HNA Survey to identify key questions that should be repeated for tracking trends. We will circulate an initial draft and meet with the Project Partners to review it and get input and comments. EPS and RRC will revise the survey prior to distribution, aiming for no more than two rounds of revisions after the initial rough draft.

We will circulate the initial draft with the Project Partners for review, input and comments, and anticipate a virtual meeting / discussion to make sure survey goals, topics and issues are transparent and addressed. We anticipate a couple of rounds of back-and-forth revisions with Project Partners to finalize the survey.

Task 3. Survey Distribution and Analysis

Following are anticipated parameters of the survey distribution and analysis. We propose a Household Survey and a Business Survey.

Survey distribution methods

We anticipate a mix of survey distribution methods in order to achieve a broad and representative sample. These methods include the following:

- Mailback survey (with online response option). In the 2018 survey effort, we mailed approximately 4000 surveys to households throughout San Miguel County, as well as Redvale, Naturita, Nucla, Ridgway, and Rico. We would propose a similar survey approach this year. Respondents would have the option of completing the survey online.
- Open link survey. As a supplement to the random sample mailback survey, we would also propose an open link survey available to everyone in the community. The open link survey would be fielded 1-2 weeks after the mailback survey, and would be promoted through the communication channels of Project Partners and other parties that may be able to assist (e.g., local chambers, large employers, elected officials via their social media accounts, etc.). This effort would also be intended to reach in-commuters who live beyond the geographic reach of the household survey (e.g., Montrose, Ridgway, Dolores).
- Special outreach to Spanish speakers. Working with the Project Partners, we would look to identify trusted organizations that work with Spanish speakers and engage their assistance in distributing the survey. We are tentatively budgeting \$3,000 for these organizations for their time in assisting with distribution of the survey to Spanish speakers.
- Exclusions. The survey sample would exclude second homeowners. Second homeowner and STR owner employment generation topics would be of interest for the separate Telluride Renovation Fee study, but those questions largely fall outside the scope of the housing needs assessment.
- Translation. The surveys would be made available in both English and Spanish.
- Incentives. Survey incentives (such as a drawing for \$100 gift cards and/or in-kind offerings that project partners may be able to provide like bus passes, etc.) are helpful for encouraging response.
- Data entry and analysis. RRC will handle data entry and data analysis. The data for the mailback and open-link surveys will be kept separate for tracking and evaluation purposes, but may be combined if they collectively provide a more demographically representative profile of the community. The results would be weighted as needed to ensure demographic representativeness.

- **Reporting.** The results would be reported as part of the HNA. The reporting would include comparisons to the 2018 results where feasible in order to allow for an understanding of changes since the last study.

Task 4. Needs Assessment Data Analysis – San Miguel County

This Task includes compiling and analyzing secondary data for San Miguel County on housing market and socioeconomic conditions.

- Economy and labor force – Trends in jobs by industry and location, wages, and commuting patterns.
- Demographics – Supplement the survey with regional trends in population, households, income, tenure (renters and owners), age, and other variables.
- Housing production – Document building permits by area and affordable housing production and inventories.
- Realtor interviews – Interview 2-3 local realtors familiar with the local and regional for-sale and rental markets.
- For-sale housing market – Update trends in home prices, differences by area, prices by unit type, and prices per sq. ft. Obtain data from a realtor or the County Assessor's database.
- Rental housing market – Research quantitative and qualitative data on the rental market by area.
- Summarize housing gaps – Illustrate the mismatch between available housing supply and resident and workforce demographics.
- Income categories – Determine if changes to each jurisdiction's income categories are warranted based on demographics, survey findings, and wages in key industries.

Task 5. Surrounding Region Market Conditions

Understanding how San Miguel County has changed in comparison to surrounding areas will help answer the questions on retaining and attracting residents and workforce back to San Miguel County. We will compile a concise set of comparison data on demographics, economies, and housing costs to compare to San Miguel County.

Task 6. Housing Challenges and Preferences

This task will synthesize the analysis and research from the survey and secondary data analyses. EPS and RRC will summarize our findings on the key housing issues and challenges such as cost, housing and economic security/stability, demographics, and workforce (commuter) flows. We will also identify reasons for displacement, which may not all be cost, and opportunities and impediments to reducing commuting by attracting and retaining more of the workforce. Related needs such as childcare and senior housing and services will also be addressed.

Task 7. Workshop: Findings, Strategies, and Actions

EPS and RRC will facilitate a workshop with the Project Partners to review the findings from Task 6 and to collaborate on developing the strategies for each jurisdiction to use in order to inform their own policy approaches to housing. Coming out of this workshop, we will begin the Draft Report.

Initial ideas on the topics to be covered include:

- Preferred housing locations (community / sub-county level)
- Transit service
- Types of other housing assistance (e.g., rental assistance, down payments, repairs)
- Areas for collaboration across jurisdictions
- Use of current funding sources
- Key actions to be taken and roles for each jurisdiction

The budget shown assumes a virtual workshop. An in-person workshop may be more productive and could be added with travel costs and minor additional staff time for travel.

Task 8. Draft and Final Deliverables

After the workshop, we will prepare a Draft Housing Needs Assessment for review by the Project Partners. The project partners will be responsible for compiling and reconciling their comments on the Draft. EPS will revise the Draft Report into a Final Report. The budget assumes two rounds of revisions, not including correction of typographic or mathematical errors by EPS or RRC.

The budget shown does not include presentations to elected/appointed policy-making bodies. Those can be added if needed.

Budget

The estimated cost is not to exceed \$94,730, as shown on the next page. The budget lists the estimated hours by staff level and task. EPS and RRC may allocate hours and expenses across tasks and firms as long as the maximum budget is not exceeded.

Preliminary cost estimates for additional services, an in-person workshop and policymaking body presentation are also shown.

Budget

Task	EPS			RRC		EPS Labor	RRC Labor	Expenses	Total
	Principal/ V.P. ¹	Associate	Research	Dir. of Research	Research				
Billing Rate	\$250	\$150	\$120	\$175	\$150				
Task 1. Kick Off, Data Collection, and Project Management	12	8	0	0	0	\$4,200	\$0	\$0	\$4,200
Task 2. Survey Design	8	4	0	26	26	\$2,600	\$8,450	\$0	\$11,050
Task 3. Survey Distribution and Analysis ²	8	8	0	60	66	\$3,200	\$20,400	\$10,600	\$34,200
Task 4. Needs Assessment Data Analysis – San Miguel County	4	40	8	0	0	\$7,960	\$0	\$0	\$7,960
Task 5. Surrounding Region Market Conditions	4	24	8	0	0	\$5,560	\$0	\$0	\$5,560
Task 6. Housing Challenges and Preferences	12	16	0	8	24	\$5,400	\$5,000	\$0	\$10,400
Task 7. Workshop: Findings, Strategies, and Actions	16	16	0	0	0	\$6,400	\$0	\$0	\$6,400
Task 8. Draft and Final Deliverables	32	40	8	0	0	\$14,960	\$0	\$0	\$14,960
Total	96	156	24	94	116	\$50,280	\$33,850	\$10,600	\$94,730
Possible Add-Ons									
In-person Workshop (add)	8	8	0	0	0	\$3,200	\$0	\$3,100	\$6,300
Polymaking body presentation	12	0	0	0	0	\$3,000	\$0	\$1,550	\$4,550

¹ Includes Principal hours at \$250/hr and Vice President hours at \$205/hr.

² \$3,000 translation expense.