

Scope of Work
Town of Pinetop-Lakeside Housing Assessment & Strategic Plan

Draft
August 24, 2009

The following constitutes the proposed Scope of Work and Project Schedule for completion of tasks for the Town of Pinetop-Lakeside Housing Assessment and Strategic Plan to be developed by the Drachman Institute under contract with the Arizona Department of Housing (ADOH) for 2009-2010.

Based on the application to the ADOH by the Town of Pinetop-Lakeside, the Drachman Institute would, with the approval of ADOH, compile from U.S. Census and other data a baseline of the Town's demographics and existing housing stock. A windshield survey of housing units and property conditions would be conducted by the Drachman Institute with a focus on selected target areas of the Town. Together with the data collected, this will be used to determine the general physical condition of existing housing units and properties within the target areas and the Town as a whole. Target areas will be selected by the designated representatives of the Town in consultation with the ADOH and the Drachman Institute.

The Town of Pinetop-Lakeside will conduct a survey to determine housing concerns of Town residents. The Town will also conduct major business employer and employee surveys, including government, schools, and other major regional employers, to determine potential demand for affordable workforce housing. Affordable housing needs, including types, sizes, and levels of affordability, will be identified and estimated, and recommendations will be developed. The Drachman Institute will provide a completed Housing Assessment and Strategic Plan in report format and will present relevant information to the Town of Pinetop-Lakeside at an interim meeting and at the conclusion of the study. The Town of Pinetop-Lakeside is responsible for advertising and arranging public meetings and assisting in coordination of appropriate dates and times for presentations and public meetings.

The Town of Pinetop-Lakeside shall assist in obtaining all information requested by the Drachman Institute (specifically related to the items outlined in the "Drachman Institute Evaluation of the Town of Pinetop-Lakeside's Readiness to Proceed with a Community Housing Assessment") in a timely and efficient manner. If any information requested is not available, the Town of Pinetop-Lakeside shall notify the Drachman Institute in a timely manner. The execution and success of the Housing Assessment and Strategic Plan is partially dependent upon obtaining such information through the Town of Pinetop-Lakeside and Navajo County.

The official contact person for this project at the Town of Pinetop-Lakeside is:

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Project Schedule Overview

<u>Item</u>	<u>Projected Completion Date</u>
Inventory of Existing Conditions	August 2009
<i>Project Scope Meeting + Windshield Survey</i>	<i>August 27, 2009</i>
Analysis of Demographics, Maps, Overview Characteristics	September 2009
Analysis of Existing Conditions + Housing Stock	September 2009
<i>First Presentation</i>	<i>TBD (October 2009)</i>
Housing Concerns Perception Surveys (by Town of Pinetop-Lakeside)	October 2009
Employer/Employee Surveys (by Town of Pinetop-Lakeside)	October 2009
Summary on Affordable Housing Needs	November 2009
<i>Interim Submittal</i>	<i>TBD (November 2009)</i>
Strategic Housing Plan Development	December 2009
<i>Second Presentation</i>	<i>TBD (December 2010)</i>
Revisions to Strategic Housing Plan	January 2010
<i>Final Submittal</i>	<i>TBD (January 2010)</i>

Scope of Work Overview

I. Inventory and Analysis of Existing Conditions

A. Town Overview, Characteristics, and Planning

- Previous housing studies/city plans
- Current and future development plans
- Existing Land Uses/Zoning
- Utilities and Infrastructure
- Environmental issues and constraints
- Natural Resources and protection
- Historical and Cultural Resources

B. Demographics

- Population: Population changes, projected population growth, composition (age, sex, etc.), elderly populations (esp. those in poverty), disabled populations (esp. those in poverty)
- Housing Profile: Housing types, age of housing stock, size, bedrooms
- Housing Market (*contact local Realtors for additional information*): Vacancy rates, vacant housing, rental rates, home values
- Household Characteristics: Size, ethnicity, income, distance from work, means of transportation
- Stress: Poverty; problems (households below median income, paying in excess of 30% for housing, incomplete kitchens/plumbing or living in crowded conditions) by tenure and income; also by tenure and type; households living below MFI (elderly, small, large, other)—renters and home owners

C. Maps + Assessor Data

- City Maps – Land Use, Zoning, etc., Aerial Photos, etc.
- Assessor Data + Parcel Maps

D. Existing Conditions of Housing Stock

- Identify target and comparative neighborhoods for windshield survey area
- Windshield survey (physical conditions of units + properties and existing land use)

First Presentation

- *Submit existing conditions assessment and analysis to client contact (for review and feedback)*
- *Present assessment and analysis at a community public meeting for questions, review, and feedback*

II. Summary and Report on Affordable Housing Needs

A. Housing Concerns Perception Surveys

- Target: Residents of Town of Pinetop/Lakeside
- Goal: Assess residents' concerns and perceptions of housing needs, perspectives on housing problems and solutions
- Administration: Town of Pinetop-Lakeside to conduct surveys – develop and distribute questionnaires, obtain responses
- Review and Analysis: Drachman Institute to tally, summarize, and analyze responses in report

B. Employer/Employee Surveys

- Target: Major employers – surveys/questionnaires regarding attracting employees + related housing costs
- Target: Employees of major employers (including government, school district, utility companies, etc.) – surveys regarding their existing housing situation + desired housing + what would attract them to live in Pinetop-Lakeside if they don't currently
- Administration: Town of Pinetop-Lakeside to conduct surveys – develop and distribute questionnaires, obtain responses
- Review and Analysis: Drachman Institute to tally, summarize, and analyze responses in report

C. Affordable Housing Needs

- Needs by income level and gap analysis
- Types of housing (ownership, rental, single-family, multi-family, senior, etc.)
- Sizes (number bedrooms, bathrooms, etc.)

Interim Submittal

- *Digital submittal of summary report for review and comments (no formal presentation)*

III. Strategic Housing Plan

A. Identify Strategies to Meet Affordable Housing Needs

- Goals and objectives
- Development funding sources/partners, Homeowner financing assistance
- Recommendations—suggestions for specific projects, infill areas, prototype designs, policy changes, etc.
- Action items

Second Presentation

- *Submit Strategic Housing Plan to client contact (for review and feedback)*
- *Present Strategic Housing Plan at a community public meeting for questions, review, and feedback*

IV. Revisions to Strategic Housing Plan as needed

Final Submittal

- *Final digital submittal of Housing Assessment and Strategic Plan (no formal presentation)*