



## City of Ketchum

July 18, 2022

Mayor Bradshaw and City Councilors  
City of Ketchum  
Ketchum, Idaho

Mayor Bradshaw and City Councilors:

### **Recommendation to Approve Purchase Order #22117 for Deed Restriction Compliance Monitoring Services**

#### Recommendation and Summary

Staff recommends approval of Purchase Order #22117 to fund Professional Services Contract related to Deed Restriction Compliance Monitoring. Action item six contained in goal one of the Housing Action Plan outlined the need for this service.

**"I move approval of Purchase Order #22117 for a Professional Services Contract with Sunny Shaw & Associates."**

#### Introduction & History

Per staff presentation and discussion to Council on June 13<sup>th</sup>, staff recommends contracting for professional compliance management and monitoring of deed-restricted units for six months. Existing staff does not have the expertise to complete this scope of work. However, the contract will allow staff to learn alongside the contractor. The contractor will review existing tenant files for eligibility in addition to general processes and policies. This six-month period can be extended but should be adequate time to train existing staff and transition responsibilities.

#### Sustainability impact

Ongoing compliance of deed restricted units ensures income-eligible households living in community housing units, thereby impacting needed commutes for workers.

#### Financial Impact

Adequate funds exist in the Strategic Initiatives Fund for this contracted amount \$16,050 (6 months).

#### Attachments:

Task Order  
Purchase Order #22117



*Sunny Shaw & Associates*

May 24, 2022

Ms. Connelly  
City of Ketchum

Thank you, again, for the opportunity to submit a proposal for consulting with the Blaine County Housing Authority/City of Ketchum. This proposal is for monthly full caseload management.

Scope of work:

- Compliance monitoring of 85 deed restricted ownership units
- Screening, as per agency policy requirements, of all applications
- Process all annual recertification including resident interviews (as needed) and engagement in process, verifications, deductions, calculations and orderly action completion
- Meet w/Director or Board Chair 1x per month by visiting office location and be available for questions and conversations throughout month. While at the office location, monitor policy compliance as it relates to file security and documentation. Time onsite is anticipated to be no more than 3 hrs. per visit
- Provide policy review and updates where lacking

Additional component of agreement:

1. It is expressly understood that all work, apart from the monthly visit, will be done remotely
2. Needed documents will be scanned and sent via email by agency staff.
3. The agency understands that on high demand/high certification months work may be assigned to an associate who regularly does work with Sunny Shaw & Associates. All work will have my review and stamp of approval before completion.
4. This agreement does not include general assistance as it relates to customer inquiries and calls.
5. Although the initial term of agreement will be 12 months, it can also be cancelled by either party with a 30-day notice.
6. If services will continue beyond 12 months, please communicate that need 60 days prior to agreement expiration.

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The cost for this service will be \$2675/month.

Respectfully submitted,  
Sunny Shaw

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**CITY OF KETCHUM**  
 PO BOX 2315 \* 191 5TH ST. \* KETCHUM, ID 83340  
 Administration 208-726-3841 (fax) 208-726-8234

**PURCHASE ORDER**  
 BUDGETED ITEM?  Yes  No

**PURCHASE ORDER - NUMBER: 22117**

<b>To:</b> 5836 SUNNY SHAW & ASSOCIATES	<b>Ship to:</b> CITY OF KETCHUM PO BOX 2315 KETCHUM ID 83340
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P. O. Date	Created By	Requested By	Department	Req Number	Terms
07/15/2022	bancona	bancona		0	

Quantity	Description	Unit Price	Total
1.00	DEED-RESTRICTION COMPLIANCE 54-4410-4200	16,050.00	16,050.00
	SHIPPING & HANDLING		0.00
	TOTAL PO AMOUNT		16,050.00

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 Authorized Signature