

Office of Community Investment and Infrastructure

FY2018-21 Fiscal Consultant Contract Urban Analytics



November 6, 2018

Contract Scope

- **Continuing Disclosure Reports**
 - Prepare property tax data for required secondary market annual disclosure reports
 - 6 reports required each year, allowance for 1 new
 - Each report requires updating tax increment tables in the original Official Statement(s)
- **Bond-related Tax Analysis**
 - Analysis, data projection, or data compilation as needed

Competitive Process

- **OCII** Purchasing Policy allows selection from a competitively established City pool.
- **Panel:** Office of Public Finance established Fiscal Consultant pool March 7, 2018.
- **Selection:** Urban Analytics, LLC
- **Criteria:** Knowledge & experience with OCII credit, successor agency experience, attractive pricing, service history.

Contract Budget

- **Not-to-Exceed Amount: \$82,500**
 - Annual Disclosure Reports: \$45,000
 - Additional Disclosure Reports: \$7,500
 - Bond-related Tax Analysis: \$30,000
- **Term:**
 - Through December 31, 2021

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Questions & Comments