



TPMA

CONTRACT: C23-3304-BCC
THOMAS P. MILLER & ASSOCIATES, LLC
ATTAINABLE WORKFORCE HOUSING
STRATEGIC PLAN
EXPIRES: 03/13/2024

Thomas P. Miller & Associates, LLC
Addendum to Professional Services Agreement
Project Number: 5512

This agreement serves as an addendum (the "Addendum") to the Professional Services Agreement originally dated March 14, 2023 entered into by and between Thomas P. Miller and Associates, LLC ("TPMA"), and Okaloosa County, FL. Except as set forth in this Addendum, the Agreement is unaffected and shall continue in full force and effect in accordance with its terms. If there is a conflict between this Addendum and the Agreement or any earlier amendment, the terms of this Addendum shall prevail.

This Addendum includes:

Change in invoice schedule. Please see attached

This addendum to the Professional Services Agreement shall be executed between TPMA and Okaloosa County, FL and accepted by both parties per signatures below.

Record of Signing

For Thomas P. Miller & Associates, LLC
Name Thomas P. Miller
Title President/CEO

Thomas P. Miller

Signed on 2023-05-08 20:54:29 GMT

Secured by Concord™
DocumentID: MTdIM2FINTYt/z
SigningID: NDA1MVEYCFLO8MD
Signing date: 5/8/2023
IP Address: 63.203.139.56
Email: tcmiller@tpm-inc.com

For Okaloosa County BCC
Name John Hofstad
Title County Administrator

John Hofstad

Signed on 2023-05-10 21:12:29 GMT

Secured by Concord™
DocumentID: MTdIM2FINTYt/z
SigningID: O5F0N2U3ZTgM2
Signing date: 5/10/2023
IP Address: 204.49.18.20
Email: jhofstad@myokaloosa.com





Invoicing Schedule

<i>Project Phase</i>	<i>Project Tasks/Deliverables</i>	<i>Cost</i>	<i>Estimated Invoice Date</i>
I. Project Launch	i. Project setup ii. Steering committee launch call iii. Present and Collect Feedback from AHAC Committee iv. Finalize Project Plan by April 11	\$16,760.00	June 1, 2023
II. Discovery	i. Document Review ii. Policy and Funding Research iii. Quantitative Research iv. Website Review	\$14,556.00	August 1, 2023
III. Engagement	i. Stakeholder identification ii. SME interviews iii. Stakeholder Workshops (in-person) iv. Public opinion survey v. AHAC Committee progress update vi. Strategy workshop	\$20,880.00*	September 1, 2023
IV. Goals and Implementation	i. Housing demand and affordability analysis ii. Needs, gaps, and barriers report iii. Existing and pending projects map iv. Recommendations for housing development corporation v. Housing strategies and recommendations draft	\$19,956.00	October 1, 2023
V. Final Report and Presentation	i. Complete draft due in September ii. Final draft by end of year	\$20,545.00	December 1, 2023
		\$92,697.00	

*Costs represent estimates and may be subject to adjustments based on amount and cost of travel and number of stakeholder engagements activities including SME interviews and in-person workshops. Any and all changes to proposed pricing will be subject to prior approval by steering committee.

Fee and Invoicing Schedule:

TPMA will submit invoices to Okaloosa County within the first 5 business days of the month following the completion of each project phase and include descriptions of the work and tasks completed.

Okaloosa County Attainable Housing Strategic Plan

Scope of Work

- I. Project Launch (March-April)
 - a. Present and Collect Feedback from AHAC Committee
 - b. Finalize Project Plan by April 11
- II. Discovery (April-May)
 - a. Document Review
 - i. Okaloosa County Comprehensive Plan
 - ii. Okaloosa County Lande Development Code (LDC)
 - iii. SHIP Local Housing Assistance Plan (LHAP)
 - iv. 2021 NACo Report Okaloosa County Housing Affordability
 - v. 2021 NACo Housing Solutions Matchmaker Tool: Okaloosa County
 - vi. Shimberg 2022 Rental Market Study
 - vii. Shimberg Rental Market Study: 2023 Update
 - viii. 2022 Okaloosa County Community Health Assessment
 - ix. Okaloosa-Walton Traffic Planning Organization Long Range Transportation Plan
 - x. Other Documents as Shared by Client and Stakeholders
 - b. Policy and Funding Research
 - i. State Housing Initiative Partnership (SHIP)
 - ii. Live Local Act
 - iii. Multifamily Programs
 - iv. Florida Homeowner Assistance Fund (HAF) (ended Aug. 2022)
 - c. Quantitative Research
 - i. Shimberg Center for Housing Studies: Florida Housing Data Clearing House (FHDC)
 - ii. BEBR Projections
 - iii. Emerald Coast Association of Realtors Data
 - d. Website Review
 - i. One Okaloosa
 - ii. Greater Fort Walton Beach Chamber of Commerce
 - iii. Florida Chamber of Commerce
 - iv. Emerald Coast Association of Realtors
- III. Engagement (May-August)
 - a. Stakeholder Identification
 - b. Subject Matter Expert Interviews
 - c. 2 in-person Stakeholder Workshops
 - d. Public Opinion Survey
 - e. AHAC Committee Progress Updates
 - f. Stakeholder Strategy Workshop
- IV. Goals and Implementation (July-August)
 - a. Housing Demand and Affordability Analysis
 - i. Basic Housing Demand Model
 - ii. Advanced Housing Demand Model

- iii. Workforce Affordability Analysis
 - b. Needs, Gaps, and Barriers Report
 - i. Land Use and Zoning
 - ii. Land Affordability
 - iii. Land Acquisition
 - iv. Insurance
 - v. Workforce Housing for all income levels and groups
 - c. Existing and Pending Projects Map
 - d. Recommendations for Housing Development Corporation
 - e. Housing Strategies and Recommendations
 - i. Focus on recommendations that will work in these communities
 - ii. Define affordability for different areas of county
- V. Final Report and Presentation (September-December)
 - a. Complete draft due by September
 - b. Project to be finished by end of year

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**PROCUREMENT/CONTRACT/LEASE
INTERNAL COORDINATION SHEET**

Procurement/Contract/Lease Number: C23-3304-BCC Tracking Number: 4924-23
Procurement/Contractor/Lessee Name: Thoms P. Miller, Associate Grant Funded: YES NO
Purpose: Amendment # 1
Date/Term: 3-14-2024 1. GREATER THAN \$100,000
Department #: NA 2. GREATER THAN \$50,000
Account #: NA 3. \$50,000 OR LESS
Amount: NO COST amendment
Department: BCC Dept. Monitor Name: Hafstad

Purchasing Review

Procurement or Contract/Lease requirements are met: DeRita Mason Date: 5-5-23
Purchasing Manager or designee: DeRita Mason, Erin Poole, Amber Hammonds

2CFR Compliance Review (if required)

Approved as written: no federal funding Grant Name: _____ Date: _____
Grants Coordinator: Suzanne Ulloa

Risk Management Review

Approved as written: see email attached Date: 5-5-23
Risk Manager or designee: Lydia Garcia

County Attorney Review

Approved as written: see email attached Date: 5-8-23
County Attorney: Lynn Hoshihara, Kerry Parsons or Designee

Department Funding Review

Approved as written: _____ Date: _____

IT Review (if applicable)

Approved as written: _____ Date: _____

DeRita Mason

From: Odessa Cooper-Pool
Sent: Friday, May 5, 2023 2:27 PM
To: DeRita Mason
Cc: Lynn Hoshihara; Kerry Parsons; Jacqueline Matichuk
Subject: FW: Amendment to TPMA Contract C23-3304-BCC
Attachments: 5512 Contract Amendment.pdf; Thomas P. Miller & Associates - sfitzgerald@myokaloosa.com - 5512 Okaloosa County, FL Amendment - Preview.pdf; Finalized Scope of Work (1).pdf

Hello DeRita,

The attached Amendment to TPMA Contract C23-3304-BCC has been reviewed and is approved by Risk Management for insurance purposes.

Thank you,

Odessa Cooper-Pool
Public Records & Contracts Specialist
Okaloosa County BCC
302 N. Wilson Street
Crestview, FL 32536
Office: 1-850-689-4111



"And, when you want something, all the universe conspires in helping you to achieve it."— Paulo Coelho, *The Alchemist*

Please note: Due to Florida's very broad public records laws, most written communications to or from County employees regarding County business are public records, available to the public and media upon request. Therefore, this written e-mail communication, including your e-mail address, may be subject to public disclosure.

From: DeRita Mason <dmason@myokaloosa.com>
Sent: Friday, May 5, 2023 11:12 AM
To: Lynn Hoshihara <lhoshihara@myokaloosa.com>
Cc: 'Parsons, Kerry' <KParsons@ngn-tally.com>; Odessa Cooper-Pool <ocooperpool@myokaloosa.com>; Jacqueline Matichuk <jmatichuk@myokaloosa.com>
Subject: FW: Amendment to TPMA Contract C23-3304-BCC

Good morning,
Please review and approve the attached.
Thank you,

DeRita Mason

From: Lynn Hoshihara
Sent: Monday, May 8, 2023 2:59 PM
To: DeRita Mason
Cc: 'Parsons, Kerry'
Subject: Re: Amendment to TPMA Contract C23-3304-BCC

This is approved.

Lynn M. Hoshihara
County Attorney
Okaloosa County, Florida

Please note: Due to Florida's very broad public records laws, most written communications to or from County employees regarding County business are public records, available to the public and media upon request. Therefore, this written e-mail communication, including your e-mail address, may be subject to public disclosure.

From: DeRita Mason
Sent: Friday, May 5, 2023 12:11 PM
To: Lynn Hoshihara
Cc: 'Parsons, Kerry'; Odessa Cooper-Pool; Jacqueline Matichuk
Subject: FW: Amendment to TPMA Contract C23-3304-BCC

Good morning,
Please review and approve the attached.
Thank you,

DeRita Mason



DeRita Mason, CPPO, CPPB, NIGP-CPP
Purchasing Manager
Okaloosa County Purchasing Department
5479A Old Bethel Road
Crestview, Florida 32536
(850) 689-5960
dmason@myokaloosa.com