

The Purchasing Memo


Date: May 20, 2026

To: Governing Body, Finance Committee, and Quality of Life Committee

From: Sandra Emory, Community Services Director *Sandra Emory*

Via: Lia Azul Salaverry, Youth and Family Services Director *Lia Salaverry*

Kristen Woods, Youth and Family Services Program Manager


KRISTEN WOODS (May 21, 2026 09:57:23 MDT)

Marcella Apodaca, Business Operations Manager *Marcella Apodaca*

Subject: Contract Amendment No 2. UPTOGETHER Cash assistance

Vendor Name: FII National dba UPTOGETHER

Munis Vendor Number: 8875

ITEM AND ISSUE:

Requests your Approval of Amendment No. 2 to 24-0368 with FII National dba UPTOGETHER to Increase the Amount by \$750,000 for a Total Compensation of \$3,250,000 and Increase the Term to end June 30, 2027 for Homelessness Prevention Cash Assistance. (Kristen Woods, Youth and Family Services Program Manager; krwoods@santafenm.gov)

CONTRACT NUMBER:

The Munis contract number is 3204103

BACKGROUND AND SUMMARY:

In 2020, the City responded to the COVID-19 Eviction crisis with one-time CARES Act funding. These funds were open from November 16- December 28, received 312 applications and was expended in less than 30 days. In 2023, to address persistent housing instability in the City, YFS budgeted \$1,000,000 for Eviction Prevention with Up Together. All of these funds were not expended. Currently, the crisis of housing instability is higher than ever. These funds are needed urgently to prevent displacement and keep people from becoming unsheltered. With Eviction Prevention funds available and call for support from community partners on the rise, we are requesting an amendment to provide cash assistance to residents and prevent displacement.

FUNDING SOURCE:

Fund Name/Number: Community Development Fund/Fund 240

Munis Org Name/Number: Community Services/ 2400122

Munis Object Name/Number: Grants and Services/ 510400

Budget Officer / Designee: Andy Hopkins Date: 05/26/2026

Budget Officer Comment/Exceptions: _____

PROCUREMENT METHOD:

The procurement method used was NMSA 1978, Section 13-1-126, Sole Source

Chief Procurement Officer (CPO)/Designee: [Signature] Date: 06/18/2026

CPO Comment/Exceptions: _____

AP
AP (May 26, 2026 08:30:13 MDT)

ASSOCIATED APPROVALS:

IT Components included? Yes | No

Approval: _____ Title: _____ Date: _____

Comment/Exceptions: _____

Treasury/Point of Sale Components included? Yes | No

Approval: _____ Title: _____ Date: _____

Comment/Exceptions: _____

Vehicles included? Yes | No

Approval: _____ Title: _____ Date: _____

Comment/Exceptions: _____

Construction to City Facilities, Furniture, and/or Fixtures included? Yes | No

Approval: _____ Title: _____ Date: _____

Comment/Exceptions: _____

Is this an externally funded purchase? Yes | No

If yes, what is the issuing agency: _____

Approval: _____ Title: _____ Date: _____

Comment/Exceptions: _____

Is this a Capital Asset or Project? Yes | No

Project Ledger Number: _____

Approval: _____ Title: _____ Date: _____

Comment/Exceptions: _____

ATTACHMENTS:

Original contract packet (with previous contract amendments)

**CITY OF SANTA FE
AMENDMENT No. 2 TO
PROFESSIONAL SERVICES AGREEMENT
ITEM# 23-0501**

This AMENDMENT No. 2 (the "Amendment") amends the CITY OF SANTA FE PROFESSIONAL SERVICES CONTRACT, dated August 4, 2023 (the "Contract"), between the City of Santa Fe (the "City") and FII-National dba UpTogether. (the "Contractor"). The date of this Amendment shall be the date when it is executed by the City and the Contractor whichever occurs last.

RECITALS:

A. Under the terms of the Contract, Contractor has agreed to provide Eviction Prevention Funds in direct cash assistance.

B. Pursuant to Article 7 of the Contract, and for good and valuable consideration, the receipt and sufficiency of which are acknowledged by the parties, the City and the Contractor agree as follows:

1. SCOPE OF WORK

Exhibit A is hereby deleted in it's entirety and replaced with the following:

A. PROGRAM SCOPE AND CRITERIA

The funds will be distributed as direct financial assistance to eligible individuals in the form of payments (through a virtual wallet that allows members to get their money via ACH transfers, UpTogether digital/physical cards, cash, check Venmo, PayPal, ApplePay or SamsungPay) of \$3,000 for each participant, over 3 months. Only one award per household will be awarded. Individuals will be deemed eligible if they meet the following criteria:

Eviction Prevention Fund

UpTogether shall provide direct, unrestricted cash assistance to eligible individuals who reside within the City of Santa Fe through an Eviction Prevention Fund as outlined below. UpTogether will distribute the cash assistance through the UpTogether Community, a technology platform that transfers unrestricted cash investments directly to individuals through bank account transfer or UpTogether digital/physical card.

The funds will be distributed as direct financial assistance to eligible individuals in the form of financial assistance payments (through a virtual wallet that allows members to get their money via ACH transfers, UpTogether digital/physical cards, cash, check Venmo, PayPal, ApplePay or SamsungPay) of \$3,000 for each participant, over 3 months. Only one award per household will be awarded.

Individuals will be eligible if they meet the following criteria:

- i. Live in the City of Santa Fe
 - a. Eligible zip codes may include: 87501, 87505, 87506, 87507, 87508.
 - b. Use [this map](#) to confirm an address is in City limits:
https://santafenm.gov/document_center/document/166
- ii. Are experiencing one or more of the following criteria:
 - a. Are in any stage of the process of eviction;
 - b. Have experienced an increase in rent at any period since July 1, 2025;
 - c. Have no written lease;
 - d. Have a lease with less than 6 months remaining;

- e. Have a hardship paying rent for any period since July 1, 2025;
 - f. Received a written or verbal demand of payment of rent, fines, fees, or other penalties from their landlord or property manager at any time since July 1, 2025; and/or
 - g. Received written or verbal notice of intent to evict by landlord or property manager at any time since July 1, 2025.
- iii. Meet the State’s definition of indigent: An applicant is presumed indigent if they earn a household income at or below 80% AMI for the Santa Fe MSA as indicated in the table below (provide updated AMI table)
- iv. Be at least 18 years old
- v. Only one person per household is eligible

Household size	1	2	3	4	5	6	7	8 or more
Maximum Annual Household Income	\$55,750	\$63,700	\$71,650	\$79,600	\$86,000	\$92,350	\$98,750	\$105,100

UpTogether will verify applicants residency, income, and identity and applicants will self attest to their eviction status and ensure they are the only person from their household applying.

Cash transfers will be made through the UpTogether Community in accordance with its policies and procedures, including UpTogether's Terms of Use Agreement on uptogether.org.

Once an applicant's eligibility is verified and a virtual wallet is created, UpTogether will issue cash transfers to the individual.

Individuals will have 60-days to successfully create their virtual wallet after being approved.

Should the applicant fail to create their virtual wallet or resolve any other payment issues within 60-days of their verification form being approved, they will forfeit their payment. The payment will be returned to the Eviction Prevention Fund for distribution to another eligible individual.

UpTogether will repeat this process up to three times to distribute all funds. Unfulfilled/forfeited cash transfers after the term of this Agreement shall be returned to the City.

Within 90 days of disbursement of all the direct cash transfers and no later than June 30, 2027,

UpTogether will provide a financial report showing all payments including ID number, date of the payment, status of the payment, payment method and payment amount.

2. COMPENSATION

Article 3 of the Contract is amended to increase the compensation of the contract by \$750,000 so that Article 3 reads as follows:

The total amount payable to the Contractor under this Agreement, including gross receipts tax and expenses, shall not exceed (\$3,250,000). This amount is a maximum and not a guarantee that the work assigned to be performed by Contractor under this Agreement shall equal the amount stated herein. The parties do not intend for the Contractor to continue to provide services without compensation when the total compensation amount is reached. Contractor is responsible or notifying the City when the services provided under this Agreement reach the total compensation amount. In no event will the Contractor be paid or services provided in excess of the total compensation amount without this Agreement being amended in writing prior to those services in excess of the total compensation amount being provided.

The \$750,000 increase in compensation shall be paid by the City to the Contractor for services satisfactorily performed according to the following table:

Eviction Prevention Fund

Payment Amount	Purpose	Deliverable to be attached to payment	Due Date
\$450,000	UpTogether will create the application for the Eviction Prevention Fund on UpTogether’s Community platform. Performance of the services described, includes the set-up and launch of the fund and presenting/ training partners on the income and eligibility requirements.	Creation of the Eviction Prevention Fund on UpTogether’s Community platform. UpTogether will provide screenshots of the application form.	Within one week of submission of an invoice and after execution of the agreement and issuance of the purchase order.
\$231,000	UpTogether will verify eligibility and approve applicants to receive cash assistance. Performance of the services described, includes disbursement of cash transfers and reporting.	Cash assistance payments will be issued to 225 eligible households within the City of Santa Fe. Payment will total \$3,000 per household within a 3 month period	No more than three weeks once the application is live upon submission of invoice.
\$69,000	For performing the services described in Exhibit A. Scope of Work including the set up and launch of the fund and disbursement of cash transfers and reporting.	Financial report showing all payments including ID number, date of the payment, status of the payment, payment method and payment amount. A report with the following information provided in aggregate for all individuals who received assistance through the funds:	No later than 90 days after the last payment is disbursed to Members through the Eviction Prevention Fund.

3. TERM

The original Contract became effective on July 3rd, 2023. This Amendment shall not become effective unless and until approved in writing by all authorized parties. The Contract, as amended, shall terminate on June 30th 2027.

4. APPROPRIATIONS

Article 16 of the Contract is hereby deleted in its entirety and replaced with the following:

The terms of this Agreement, and any orders placed under it, are contingent upon sufficient appropriations and authorization being made by the City Council for the performance of this Agreement. If sufficient appropriations and authorization are not made, this Agreement, and any orders placed under it, shall terminate upon written notice being given by the City to the Contractor. The City's decision as to whether sufficient appropriations are available shall be accepted by the Contractor and shall be final. If the City proposes an amendment to the Agreement to unilaterally reduce funding, the Contractor shall have the option to terminate the Agreement or to agree to the reduced funding, within thirty (30) days of receipt of the proposed amendment.

5. EXHIBIT B

Exhibit B of the Contract is hereby deleted in its entirety.

6. CONTRACT IN FULL FORCE.

Except as specifically provided in this Amendment, the Contract remains and shall remain in full force and effect, in accordance with its terms.


[SIGNATURE PAGE TO FOLLOW]

IN WITNESS WHEREOF, the parties have executed this Amendment No. 2 to the Contract as of the dates set forth below.

CITY OF SANTA FE:

CONTRACTOR:
FII-National dba UpTogether

MICHAEL GARCIA, MAYOR



Jesus Gerena (May 14, 2026 10:16:10 EDT)
JESUS GERENA, CEO

DATE: _____

DATE: **May 14, 2026**

CRS# _____

ATTEST:

GERALYN CARDENAS, CITY CLERK

CITY ATTORNEY'S OFFICE:



Ruby Crews (May 19, 2026 14:50:15 MDT)
RUBY CREWS, ASSISTANT CITY ATTORNEY

APPROVED FOR FINANCES:



ANDREA PHILLIPS (Jun 18, 2026 17:34:32 MDT)

ANDREA PHILLIPS, INTERIM FINANCE DIRECTOR



City of Santa Fe, New Mexico



SOLE SOURCE REQUEST AND DETERMINATION FORM

This Sole Source request form **must** be submitted to the Central Purchasing Division for authorization, determination, and processing by the Chief Procurement Officer (CPO).

Complete this form in its entirety!

Date: Prepared By:

Email: Phone #:

Description of Goods/Service to be Procured (short title):

Vendor Name:

Address:

City: State: Zip Code:

Justification (choose from the drop down): Unique Expertise

Type of good/service (choose from the drop down): Services

*Estimated Cost: Term of Contract:

*Tax is subject to change. **Ensure the amount matches the amount to be invoiced. If the vendor must charge tax, they need to state that "tax will be added on the invoice" or include it in their quote.**

Quantity of the service:
example: 12 MONTHS, 15 LICENSES, ETC.

Conversion: To Contract Org / Object:

Place checkmarks to affirm you agree and have included these documents:

- The vendor has affirmed sole source for the services, construction, or items of tangible personal property by providing a letter on company letterhead signed by leadership affirming they are the sole provider of the goods/services outlined in the scope of work, and documentation has been provided that due diligence was conducted to identify other possible vendors/contractors to provide the requested services/goods but proved unsuccessful.
- Itemized price quote from sole source vendor fully detailing costs for goods/services in scope of work. (Must state whether they are going to charge tax or not.)
- If contract value exceeds CM Approval Amount, include agenda item to present to 2 Committees and Governing Body.



City of Santa Fe, New Mexico



Place checkmarks to affirm this request aligns with each of the requirements in NMSA 1978, Section 13-1-126:

- There is only one source for the required service, construction, or item of tangible personal property.
- The service, construction, or item of tangible personal property is unique and this uniqueness is substantially related to the intended purpose of the contract.
- Other similar services, construction, or items of tangible personal property cannot meet the intended purpose of the contract.

1. Explain the purpose/need of purchase. Ensure to include a thorough **scope of work** for the services, construction, or item(s) of tangible personal property (if this is an amendment request to an existing contract, attach current contract).
-Please note that specifications cannot be narrowly drafted to preclude competition solely to allow award to a favored vendor.

The scope of work for this procurement:

Provide assistance to eligible Santa Fe City and County residents affected by the COVID-19 and the financial hardships that ensue post-pandemic through three funds: 1) Economic Relief, 2) Eviction Prevention, and 3) Short Term Guaranteed Income. Further explanation can be found in Attachment A.

2. Provide a detailed explanation of the criteria developed and specified by the department as necessary to perform and/or fulfill the contract.

UpTogether is a nonprofit organization that stands out for its innovative approach to poverty alleviation. Here are some reasons why it's important and unique:

Empowerment Through Direct Cash Transfers: UpTogether provides direct cash transfers to individuals and families experiencing poverty. Unlike traditional charitable models that may focus on providing specific goods or services, UpTogether believes in empowering people by giving them agency over their own financial resources. This approach respects individuals' autonomy and dignity while addressing their immediate needs.

Community-Centric Approach: UpTogether recognizes the importance of community support in overcoming poverty. It facilitates the formation of support networks among participants, fostering a sense of belonging and solidarity. By connecting people with similar experiences, UpTogether creates opportunities for mutual assistance and collective problem-solving.

Long-Term Investment in Human Potential: Instead of offering short-term assistance, UpTogether invests in the long-term well-being and potential of individuals and families. By providing ongoing support and resources, it helps people build financial stability, pursue education and career goals, and



City of Santa Fe, New Mexico



achieve upward mobility. This approach acknowledges that escaping poverty requires sustained effort and investment in human capital.

Data-Driven Impact Assessment: UpTogether employs data analytics to track the impact of its programs and interventions. By collecting and analyzing data on participants' progress, it continuously evaluates the effectiveness of its strategies and identifies areas for improvement. This commitment to evidence-based practices ensures that UpTogether's resources are allocated efficiently and that its programs have a meaningful impact on poverty reduction.

Scalability and Replicability: UpTogether's model is designed to be scalable and replicable in different contexts and communities. By leveraging technology and partnerships, it can reach a wide range of individuals and tailor its programs to local needs and priorities. This scalability allows UpTogether to maximize its impact and extend its reach to more people in need.

Overall, UpTogether's combination of direct cash transfers, community engagement, long-term investment, data-driven approach, and scalability makes it an important and unique player in the fight against poverty. It embodies a holistic and empowering approach to poverty alleviation that recognizes the inherent dignity and potential of every individual.

- 3. Provide an explanation of the prospective vendor's unique qualifications, proprietary rights, or capabilities that make them the only source able to meet the intended purpose of the contract. Uniqueness should be fact-based and substantially related to the contract's purpose. Reasons should focus on factual uniqueness rather than statements such as "best" or "least costly" source.**

FII-National dba UpTogether (previously Family Independence Initiative) is a national nonprofit that highlights, accelerates and invests in the initiative of people in financially underresourced communities, taking to improve their lives and move up, together. Through its signature online platform, the UpTogether Community, individuals and families can build resources, strengthen their social networks, and access unrestricted capital. The UpTogether Community is designed to transfer unrestricted cash investments directly to members through bank accounts or pre-paid cards. The UpTogether Community platform is the only one of its kind.

- 4. Explain why other similar professional services, services, construction, or item(s) of tangible personal property *cannot* meet the intended purpose of the contract.**

The unique system utilized by UpTogether is exclusive to the organization, with no other vendors having access to its proprietary cloud-based solution, processes, and methodologies.



City of Santa Fe, New Mexico



Approvals:

Based on the above facts, the City of Santa Fe Purchasing Officer has made the determination that the justification for a Sole Source procurement is in accordance with NMSA 1978, Section 13-1-126 and shall be posted for a 30-day period prior to award.

Travis Dutton-Leyda, CPO for the City of Santa Fe

Date: Apr 19, 2024

Department Approval by:

Maria Sanchez-Tucker, Community Services Department Director

Date: Apr 19, 2024

Pursuant to NMSA 1978, Section 13-1-126 Sole Source Procurement, the 30-day posting period of the Notice of Intent to Award this Sole Source request was met and no objections to the award to the above referenced vendor were received. *This Sole Source determination will be valid for the term stated on the first page of this document.*

Travis Dutton-Leyda, CPO for the City of Santa Fe

Date: May 20, 2024

Procurement Number:
#40-M0087-24-CP114



← Back to All Requests

Eviction Prevention Cash Assistance - UP Together

2026-747-Request

Status: Amount: Last Action:
Review \$1,000,000.00 ✔ Approved

Actions

Step 4 of 5

Waiting For

Procurement Analyst Posting **KM** Kristy Miera Procurement Analyst Senior

On Hold

Reject

Approve

Jump To: SOLE SOURCE REQUEST AND DETERMINATION Purchase Details 1 Vendor Selection Sole Source Assessment Attachments

SOLE SOURCE REQUEST AND DETERMINATION [Edit](#)

Name of Request	Created On
Eviction Prevention Cash Assistance - UP Together	05/01/2026
Summary of Request	
We are requesting a Sole Source Determination and ultimately a contract with Up Together.	
No Background or Category Codes	
Requestor	Approval Group
KW Kristen Woods	Youth & Family
Creator	
JG Justin Gonzales	
Desired Delivery Date	
06/30/2026	
Fiscal Year	
FY27	

Purchase Details [Edit](#)

Total Budget Amount
\$1,000,000.00

Vendor Selection [Edit](#)

No vendor selected at this time.

+ Add Vendor by searching for a vendor or contract

Sole Source Assessment [Edit](#)

Date of Submission:

04/09/2026

Department Contact:

Kristen Woods

Email:

krwoods@santafenm.gov

Phone Number

505-955-6913

Quantity of the Goods or Service

1 Contract

Type of Good or Service

Professional Services

Justification

Proprietary

Explain the Purpose/Need of the Purchase

Every year the City of Santa Fe shares Eviction Prevention Cash assistance to support the stabilization of renters with limited incomes. Up Together has a proprietary software platform specifically tailored to offer cash assistance around the pillars of community and has the current and active data to meet criteria for cash assistance programs. Cash and choice to offer a low-barrier way for participants to receive assistance.

Conversion:

To Contract

Term of Contract (Sole Source)

4 years

Department Criteria:

Provide direct, unrestricted cash assistance to eligible individuals who reside within the City of Santa Fe through an Eviction Prevention Fund as outlined below.

Transfers unrestricted cash investments directly to individuals through bank account transfer or digital/physical card.

The funds will be distributed as direct financial assistance to eligible individuals in the form of financial assistance payments of \$3,000 for each participant, over 3 months. Only one award per household will be awarded.

Individuals will be eligible if they meet the following criteria:

- Verify using approved documentation
 - o Meet the HUD 80% low income limits. An applicant is presumed indigent if they earn a household income at or below 80% the median family income for the Santa Fe MSA as indicated in the table below.
 - o Live in the City of Santa Fe
 - Eligible zip codes may include: 87501, 87505, 87506, 87507, 87508.
- Self attest to the following:
 - o Are at least 18 years of age
 - o Are experiencing one or more of the following criteria (multi-select)
 - Are in any stage of the process of eviction;
 - Have experienced an increase in rent since July 1, 2025 to present;
 - Have no written lease;
 - Have a hardship paying rent for any period since July 1, 2025 to present;
 - Received a written or verbal demand of payment of rent, fines, fees, or other penalties from their landlord or property manager at any time since July 1, 2025 to present; and/or
 - Received written or verbal notice of intent to evict by landlord or property manager at any time since July 1, 2025 to present.
 - o They are the only applicant from their household. A household is defined as all the people who reside together in a house, apartment or a single room when it is occupied as separate living quarters.

Verify applicants residency, income, and identity and applicants will self attest to their eviction status and ensure they are the only

person from their household applying.

Issue cash transfers to the individual.

Vendor Name

FII-National dba Up Together

Vendor's Address

2401 East Street STE 1149, Concord California, 94520

Assessment of Vendor's Exclusive Qualifications:

They have a proprietary software platform called Up Together Connect. This is a unique technology that only Up Together offers that is based on community, cash, and choice while offering a low-barrier way for participants to apply for direct cash assistance.

Explanation of Unsuitable Alternatives

Up Together has a software uniquely designed for cash-assistance and accepting applications, precisely what our programming is looking to accomplish. Other organizations do not offer this software as it is proprietary.

Place checkmarks to affirm this request aligns with each of the requirements in NMSA 1978, Section 13-1-126


- The service, construction, or item of tangible personal property is unique and this uniqueness is substantially related to the intended purpose of the contract.
- There is only one source for the required service, construction, or item of tangible personal property.
- Other similar services, construction, or items of tangible personal property cannot meet the intended purpose of the contract.


Place checkmarks to affirm you agree and have included these documents

- The vendor has affirmed sole source for the services, construction, or items of tangible personal property by providing a letter on company letterhead signed by leadership affirming they are the sole provider of the goods/services outlined in the scope of work, and documentation has been provided that due diligence was conducted to identify other possible vendors/contractors to provide the requested services/goods but proved unsuccessful.
- The requesting department has verified through Pavilion, internet searches, and other market research that these sources are not available from alternative vendors.
- Itemized price quote from sole source vendor fully detailing costs for goods/services in scope of work. (Must state whether they are going to charge tax or not.)
- If contract value exceeds CM Approval Amount, include agenda item to present to 2 Committees and Governing Body.

Attachments  Edit

Uploaded Documents

 UpTogether Letter to City of Santa Fe - FY27 Eviction Prevention.pdf

 City of Santa Fe_Sole Source Letter and Budget_2026.5.pdf

Workflow



 Edit

✓ Request Submitted ^
Created By JG Justin Gonzales
On Behalf Of KW Kristen Woods
Submitted by Kristy Miera on 5/21/26 at 1:25pm
Returned on 5/11/26 at 10:57am
Submitted by Justin Gonzales on 5/1/26 at 3:15pm
✓ Director v Approved
✓ Procurement Analyst Review 1 v Approved
✓ CPO Review v Approved
4 Procurement Analyst Posting v Waiting for Approval
5 CPO 30 day Review v Not Started



March 27, 2026

To Whom It May Concern:

Founded in 2001, UpTogether is a systems change organization working to disrupt the status quo approach to ending poverty. We aim to change policies, systems, and underlying beliefs so that all people in the United States are seen and invested in for their strengths and can build power, reinforce their autonomy, and drive their own economic and social mobility. We do this by investing in people in historically undervalued communities and amplifying their true lived experiences, working together to influence policies and mobilize for systems change.

UpTogether has been partnering with the City of Santa Fe since 2020 to directly invest unrestricted cash in Santa Feans living with limited incomes. Most recently, we completed a partnership with the City to distribute more than \$3.3 million in American Rescue Plan Act and general fund dollars to almost 1,400 households impacted by COVID-19. Part of this effort included the most recent Santa Fe Eviction Prevention fund, which provided one-time payments to 317 households who were experiencing housing instability. It also included the first Santa Fe Learn, Earn, Achieve Program (LEAP), which invested in 85 student parents with a goal of supporting completion of their degree or certification.

In 2025, we launched a second Santa Fe LEAP, this time investing in 100 student parents with \$1,000/month over 9 months. This fund started last August and will end this June, at which time we will have distributed a total of over \$1.3 million through both LEAP funds.

We distribute direct cash payments through our proprietary software platform, UpTogether Connect. This unique technology, based on our organizational pillars of community, cash, and choice, offers a low-barrier way for participants to apply for the direct cash investments. We use self-attestation to eligibility questions whenever possible, and never require unnecessary private information. We believe we are well-situated to implement the upcoming Santa Fe Eviction Prevention Fund.

Thank you,

Jesús Gerena
CEO, FII-National dba UpTogether
663 13th Street, Suite 200
Oakland, CA 94612
jesus@uptogether.org

May 7, 2026

To: Kristen Woods, Program Manager, Youth and Family Services Division, Community Services Department
 Description: Addendum to letter from UpTogether sent on March 27, 2026
 Purpose: Quote for FY27 Santa Fe Eviction Prevention Fund

This addendum is to provide a quote for UpTogether's services as outlined in the letter sent on March 27, 2026.

Based on our current understanding of the level of support required to complete the Scope of Work, the below fee range is requested.

Total estimated project cost: \$1,000,000



FII-National DBA UpTogether
 Santa Fe FY27 Eviction Prevention Fund

EXPENSES	Total Budget	Notes
- Direct cash Payments	\$909,000	The exact total of Direct cash payments and participants in the UpTogether Fund will depend on the agreed upon UpTogether Fund design.
- Direct UpTogether Fund Implementation Cost	\$90,900	Implementation Costs include the expenses related to Wages and Benefits, Consultants, payment processor merchant fees, and UpTogether Connect functionality and security services, directly involved in the implementation of the project.
Total Project Cost	\$1,000,000	

Thank you for your consideration.



Jesús Gerena
 CEO/ President
 UpTogether
 jesús@uptogether.org



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

09/11/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Integral Insurance Solutions 555 1st St Ste 302 Benicia CA 94510	CONTACT NAME: Philip Thomas PHONE (A/C. No. Ext): 707-400-0636 E-MAIL ADDRESS: mail@integralins.net	FAX (A/C. No.): 707-742-2888
	INSURER(S) AFFORDING COVERAGE	
INSURED FII-National Corp aka: FII National 2041 East St, Ste 1149 Concord CA 94520	INSURER A: CFC Underwriting Limited (Lloyd's)	
	INSURER B: Hartford Casualty Insurance Company	
	INSURER C: Travelers Casualty and Surety Co of America	
	INSURER D: At-Bay Specialty Insurance Company	
	INSURER E:	
	INSURER F:	

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES, LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY			PSO0040487646	09/02/2025	09/02/2026	EACH OCCURRENCE \$ 2,000,000
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	Y	Y				DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ 3,000,000
A	AUTOMOBILE LIABILITY			PSO0040487646	09/02/2025	09/02/2026	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	<input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS		<input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS				BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB EXCESS LIAB						EACH OCCURRENCE \$ AGGREGATE \$
	DED RETENTION \$						
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	72WECAV3F70	12/14/2024	12/14/2025	<input checked="" type="checkbox"/> WC STATUTORY LIMITS E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Errors & Omissions	Y		PSO0040487646	09/02/2025	09/02/2026	OCCURRENCE / AGGREGATE \$1,000,000 / \$3,000,000
C	Directors & Officers			107694199	09/02/2025	09/02/2026	OCCURRENCE / AGGREGATE \$2,000,000 / \$2,000,000
D	Cyber Liability			AB-6605020-06	09/02/2025	09/02/2026	OCCURRENCE / AGGREGATE \$1,000,000 / \$1,000,000
C	Crime Insurance	Y		107694199	09/02/2025	09/02/2026	OCCURRENCE / AGGREGATE \$5,000,000 / \$5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

City of Santa Fe are additional insured per blanket endorsement

Policies shall not be changed or canceled until thirty (30) days written notice has been given to the certificate holder

**Additional Insured blanket verbiage on attached under "Conditions" at Section 2

***Waiver of Subrogation blanket verbiage on attached under "Conditions" at Section 22

CERTIFICATE HOLDER**CANCELLATION**

City of Santa Fe
 PO Box 909
 Santa Fe, NM 87504

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Item#: 24-0368
Munis Contract: #3204103

**CITY OF SANTA FE AMENDMENT No. 1 TO
RECOVERY FUNDS SUBRECIPIENT
CONTRACT BETWEEN CITY OF SANTA FE AND FII—NATIONAL dba
UPTOGETHER
FOR ECONOMIC RELIEF TO THE RESIDENTS OF SANTA FE COUNTY AND THE
CITY OF SANTA FE IN THE FORM OF DIRECT CASH ASSISTANCE
Item #23-0501**

This AMENDMENT No.1 (the "Amendment") amends the CITY OF SANTA FE RECOVERY FUNDS SUBRECIPIENT CONTRACT, dated August 4, 2023, (the "Agreement"), between the City of Santa Fe (the "City") and FII- NATIONAL dba UPTOGETHER (the "Contractor"). The date of this Amendment shall be the date when it is executed by the City and the Contractor whichever occurs last.

RECITALS:

A. The Contractor has agreed to provide assistance to eligible Santa Fe County and City of Santa Fe residents impacted by the economic hardships of the COVID pandemic through two funds: 1) One-Time Economic Relief and 2) Short-term Economic Payments, as outlined in Exhibit A of the Agreement.

B. Pursuant to Article 7 of the Agreement, and for good and valuable consideration, the receipt and sufficiency of which are acknowledged by the parties, the City and the Contractor agree as follows:

1. SCOPE OF WORK

a. The last paragraph on page 17 of Exhibit A, "Scope of Work", is replaced with the following:

Additionally, only one award per household - defined as all the people who comprise one household, which can be a house, an apartment or a single room when it is occupied as separate living quarters - will be allowed. This will be verified by: 1) individuals will self-attest that only one individual in their household is submitting an application, and 2) UpTogether will only approve one award per unique street address, excepting those who list a transitional housing address or shelter address as their residence at time of application, who shall be verified through their submitted name, self-attestation that they are the only one in their household applying, and verification by UpTogether that their address is a shelter.

b. Page 22, Bullet 7 of Exhibit A of the Contract is replaced in its entirety, to allow individuals who are residents in transitional housing or shelters to qualify for assistance, as follows :

Additionally, only one award per household – shall be allowed. "Household" is defined as all the people sharing a house, an apartment, or a single room when it is occupied as separate living quarters. UpTogether shall verify that it does not grant more than one

(1) award per Household by: 1) requiring applicants to self-attest that no other individuals in their Households have submitted an application for an award, and 2) UpTogether shall only approve one award *per unique street address*, except in cases where the applicant lists a transitional housing address or shelter address (“Transitional/Shelter Address”) as their residence at time of application. If an applicant lists a Transitional/Shelter Address that is not unique as their residence at the time of application, UpTogether shall verify that the applicant is residing at a Shelter Address and has not already applied for funding by cross-checking the applicant's name as written on the application with the names of other applicants who have received awards, requiring the applicant to self-attest that they are the only one in the Household applying for an award, and that no one else in the Household has applied for an award. UpTogether shall also verify that the address listed on the application is a Transitional/Shelter Address.

2. COMPENSATION

- a. Article 3 Compensation Schedule of the Contract is amended in its entirety with the following Compensation Schedule to tie deliverables to each subcategory of funding allowing for the release of additional funds related to that subcategory:

Compensation Schedule. Contractor will be paid according to the following schedule:

One-Time Economic Relief Fund

Payment Amount	Purpose	Deliverable attached to Payment	Due Date
\$313,750.00	Distribute one-time payments of \$1,250 to 251 households through the One-Time Economic Relief Fund	Creation of the One-Time Economic Relief Fund on the UpTogether Community platform. UpTogether will	Four weeks within full execution of the Agreement

		provide screenshots of the verification forms.	
\$315,000.00	Distribute one-time payments of \$1,250 to 252 households	Financial report showing: Payments of \$1,250 to 251 households through the One-Time Economic Relief Fund, including member ID, date of the payment, status of the payment, payment method and payment amount	Upon distribution of one-time payments to 251 households
\$315,000.00	Distribute one-time payments of \$1,250 to 252 households	Financial report showing: Payments of \$1,250 to 252 households through the One-Time Economic Relief Fund, including member ID, date of the payment, status of the payment, payment method and payment amount	Upon distribution of one-time payments to 252 households
\$56,250.00	For performing the services described in Exhibit A. Scope of Work for the One-Time Economic Relief Fund, including the set up and launch of the fund, training to nonprofit partners, disbursement of cash transfers, and reporting	Financial report for all 755 payments including member ID, date of the payment, status of the payment, payment method, and payment amount. A report with the following information provided in aggregate for all individuals who received assistance through the One-Time Economic Relief Fund: residential zip code, age, race, gender identity, household size, occupation, and the proposed use of the funds.	No later than 90 days after the last payment is disbursed to Members through the One-Time Economic Relief Fund
Total Amount for One-Time Economic Relief*			\$1,000,000.00
*These million dollars (\$1,000,000.00) funded by Santa Fe County ARPA Fund dollars, County ARPA Project Ledger #COM2324003			

Short-Term Economic Payments Fund, 9-Month Option

Payment Amount	Purpose	Deliverable attached to Payment	Due Date
\$ 468,000.00	Enroll 104 households in the Short-	Creation 9-month Short-Term Economic Payments Fund on the UpTogether Community	Four weeks within full

	Term Economic Payments Fund 9-month option (\$4,500 distributed through 9 payments of \$500)	platform. UpTogether will provide screenshots of the verification forms.	execution of the Agreement
\$472,500.00	Enroll 105 households in the Short-Term Economic Payments Fund 9-month option (\$4,500 distributed through 9 payments of \$500)	At least the first monthly payment to 104 households in the 9 months option including member ID, date of the payment, status of the payment, payment method, and payment amount.	Upon enrollment of 104 households in the 9-month Short Term Economic Payments fund
\$59,394.00	For performing the services described in Exhibit A. Scope of Work for the One-Time Economic Relief Fund, including the set up and launch of the fund, training to nonprofit partners, disbursement of cash transfers, and reporting	Financial report for the Short-Term Economic Payments Fund, including member ID, date of the payment, status of the payment, payment method, and payment amount. A report with the following information provided in aggregate for all individuals who received assistance through the Short-Term Economic Payments Funds (9-month and 12-month): residential zip code, age, race, gender identity, household size, occupation, and the proposed use of the funds.	No later than 90 days after the last payment is disbursed to Members through the Short-Term Economic Payments Funds, both 12- and 9-month
Total Amount for Short-Term Economic Relief-9-month option			\$ 999,894

Short-Term Economic Payments Fund, 12-Month Option

Payment Amount	Purpose	Deliverable attached to Payment	Due Date
\$ 470,400.00	Enroll 98 households in the Short-Term Economic Payments Fund 12-month option (\$4,800 distributed through 12 payments of 400)	Creation of the 12-month Short-Term Economic Payments Fund on the UpTogether Community platform. UpTogether will provide screenshots of the verification forms.	Four weeks within full execution of the Agreement

\$29,706.00	For performing the services described in Exhibit A. Scope of Work for the One-Time Economic Relief Fund, including the set up and launch of the fund, training to nonprofit partners, disbursement of cash transfers, and reporting	Financial report for the Short-Term Economic Payments Fund, including member ID, date of the payment, status of the payment, payment method, and payment amount. A report with the following information provided in aggregate for all individuals who received assistance through the Short-Term Economic Payments Funds (9-month and 12-month): residential zip code, age, race, gender identity, household size, occupation, and the proposed use of the funds.	No later than 90 days after the last payment is disbursed to Members through the Short-Term Economic Payments Funds, both 12- and 9-month
Total Amount for Short-Term Economic Relief-12-month option			\$500,106
Any funds remaining unassigned by August 31, 2024, in the 12-month Short-Term Economic Payments Fund will be reassigned to the 9-month Short-Term Economic Payments Fund. This will occur in blocks of \$4,500.00 (9 months, \$500 per month). Additional funds that remain unassigned will be reverted back to the City by November 30, 2024.			

b. Article 3, Paragraph F of the Agreement is replaced in it's entirety with the following :

The contractor may use SLFRF funds to cover eligible costs incurred during the period that begins on March 3, 2021 and ends on June 30, 2026, if the award funds for the obligations incurred by June 30, 2026 are expended by December 31, 2026. Costs for projects incurred by the subrecipient prior to March 3, 2021 are not eligible, as provided for in Treasury's final rule. Any funds not obligated or expended for eligible uses by the timelines above must be returned to Treasury, including any unobligated or unexpended funds that have been provided to subrecipients and contractors as part of the award closeout process pursuant to 2 C.F.R. 200.344(d).

3. TERM:

Article 4 of the Contract is hereby deleted in its entirety and replaced with the following Article 4 in its place:

This Contract shall be effective when signed by the City and shall terminate on June 30, 2026. In no event will the term exceed the duration allowed by statute, NMSA 1978, 13-1-150.


C. AGREEMENT IN FULL FORCE.

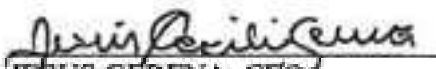
Except as specifically provided in this Amendment, the Agreement remains and shall remain in full force and effect, in accordance with its terms.

IN WITNESS WHEREOF, the parties have executed this Amendment No. 1 to the Agreement as of the dates set forth below.

CITY OF SANTA FE:

CONTRACTOR:
PIL-NATIONAL dba UPTOGETHER


Alan Webber (Jun 20, 2024 21:06 CDT)
ALAN M. WEBBER, MAYOR



JESUS GERENA, CEO

DATE: Jun 20, 2024

DATE: March 11, 2024

CRS#03-342595-00-7
Registration # 233939
Federal UEI # 873148568

ATTEST:


GERALYN CARDENAS, INTERIM CITY CLERK
GB MTG 05/29/24 XIV

CITY ATTORNEY'S OFFICE:


ASSISTANT CITY ATTORNEY

Mar 13, 2024

APPROVED FOR FINANCES:

Emily R. Oster

EMILY OSTER, FINANCE DIRECTOR

COM222400B (\$1,500,000.00)

City ARPA Project Ledger #

AJH

COM2324003 (\$1,000,000.00)

County ARPA Project Ledger #

**RECOVERY FUNDS SUBRECIPIENT
CONTRACT BETWEEN CITY OF SANTA FE AND FII – NATIONAL dba
UPTOGETHER
FOR ECONOMIC RELIEF TO THE RESIDENTS OF SANTA FE COUNTY AND THE
CITY OF SANTA FE IN THE FORM OF DIRECT CASH ASSISTANCE**

THIS AGREEMENT is made and entered into by and between the City of Santa Fe, herein after referred to as the “City”, and **FII- NATIONAL dba UPTOGETHER** herein after referred to as the “Contractor” or “Up Together”

RECITALS

WHEREAS, the City, as a recipient of a State and Local Fiscal Recovery Funds (SLFRF) award, has substantial discretion to use the award funds in the ways that best suit the needs of the City if such use fits into one of the following four statutory categories:

1. To respond to the COVID-19 public health emergency or its negative economic impacts;
2. To respond to workers performing essential work during the COVID-19 public health emergency by providing premium pay to eligible workers of the recipient that are performing such essential work, or by providing grants to eligible employers that have eligible workers who perform essential work;
3. For the provision of government services, to the extent of the reduction in revenue of such recipient due to the COVID–19 public health emergency, relative to revenues collected in the most recent full fiscal year of the recipient prior to the emergency; or
4. To make necessary investments in water, sewer, or broadband infrastructure;

WHEREAS, this Contract falls within the first statutory category;

WHEREAS, recipients are responsible for ensuring that any procurement using SLFRF funds, or payments under procurement contracts using such funds, Coronavirus State and Local Fiscal Recovery Funds Compliance and Reporting Guidance are consistent with the procurement standards set forth in the Uniform Guidance at 2 CFR 200.317 through 2 CFR 200.327, as applicable;

WHEREAS, the Uniform Guidance establishes in 2 CFR 200.319 that all procurement transactions for property or services must be conducted in a manner providing full and open competition, consistent with standards outlined in 2 CFR 200.320, which allows for non-competitive procurements only in circumstances where at least one of the conditions below is true: the item is below the micro-purchase threshold; the item is only available from a single source; the public exigency or emergency will not permit a delay from publicizing a competitive solicitation; or after solicitation of a number of sources, competition is determined inadequate;

WHEREAS, Subrecipients under the SLFRF program are entities that receive a subaward from a recipient to carry out the purposes (program or project) of the SLFRF award on behalf of the recipient; and

WHEREAS, FII- NATIONAL dba UPTOGETHER understands that this contract represents a subaward of SLFRF funds, agrees to maintain records to satisfy all compliance requirements for use of SLFRF, and agrees to all reporting requirements for expenditures of SLFRF funds, specifically the performance measures listed under Section 2.B.

IT IS MUTUALLY AGREED BETWEEN THE PARTIES:

1. Definitions

- A. "Products and Services Schedule" refers to the complete list of products and services offered under this Agreement and the price for each. Product and service descriptions may be amended with the prior approval of the Agreement Administrator. New products and services shall not be added to the Products and Services Schedule.
- B. "Business Hours" means 8:00 a.m. to 5:00 p.m. Mountain Time.
- C. "Subrecipient" means an entity, usually but not limited to non-Federal entities, that receives a subaward from a pass-through entity to carry out part of a Federal award; but does not include an individual that is a beneficiary of such award. 2 C.F.R. § 200.1
- D. "You" and "your" refers to **FII- NATIONAL dba UPTOGETHER**. "We," "us" or "our" refers to the City and whose accounts are created under this Agreement.

2. Scope of Work

- A. The Contractor shall provide assistance to eligible Santa Fe County and City of Santa residents impacted by the economic hardships of the COVID pandemic through two funds: 1) One-Time Economic Relief and 2) Short-term Economic Payments, as outlined in Exhibit A.
- B. Number of households served, period expenditures, period obligation, project status.

3. Compensation

Compensation Schedule. Contractor will be paid according to the following schedule:

Payment Amount	Purpose	Deliverable Attached to Payment	Due Date
\$1,252,150	Distribute one-time payments of \$1,250 to 251 households through the	Creation of the One-Time Economic Relief Fund and Short-Term Economic	Four weeks within full execution of the

	One-Time Economic Relief Fund and to enroll 202 households in the Short-Term Economic Payments Fund (104 in the 9 months option and 98 in the 12 months option)	Payments Fund on the UpTogether Community platform. UpTogether will provide screenshots of the verification forms.	Agreement
\$787,500	Distribute one-time payments of \$1,250 to 252 households and enroll 105 households in the Short-Term Economic Payments Fund (105 in the 9 months option)	Financial report showing: 1) Payments of \$1,250 to 251 households through the One-Time Economic Relief Fund, including member ID, date of the payment, status of the payment, payment method, and payment amount; and 2) At least the first monthly payment to 202 households through the Short-Term Economic Payments Fund (104 in the 9 months option and 98 in the 12 months option), including member ID, date of the payment, status of the payment, payment method, and payment amount.	Upon distribution of one-time payments of \$1,250 to 251 households & enrollment of 202 households in the Short-Term Economic Payments Fund
\$315,000	Distribute one-time payments of \$1,250 to 252 households.	Financial report showing: 1) Payments of \$1,250 to an additional 252 households through the One-Time Economic Relief Fund, including member ID, date of the payment, status of the payment, payment method, and payment amount; and 2) At least the first monthly payment to an additional 105 households through the Short-Term Economic Payments Fund (9 months option), including member ID, date of the payment, status of the payment, payment method, and payment amount.	Upon distribution of one-time payments of \$1,250 to an additional 252 households & enrollment of an additional 105 households in the Short-Term Economic Payments Fund (9 months option)

<p>\$56,250</p>	<p>For performing the services described in Exhibit A. Scope of Work for the One-Time Economic Relief Fund, including the set up and launch of the fund, training to nonprofit partners, disbursement of cash transfers, and reporting</p>	<p>Financial report for all 755 payments including member ID, date of the payment, status of the payment, payment method, and payment amount.</p> <p>A report with the following information provided in aggregate for all individuals who received assistance through the One-Time Economic Relief Fund: residential zip code, age, race, gender identity, household size, occupation, and the proposed use of the funds.</p>	<p>No later than 90 days after the last payment is disbursed to Members through the One-Time Economic Relief Fund</p>
<p>\$89,100</p>	<p>For performing the services described in Exhibit A. Scope of Work for the Short-Term Economic Payments Fund, including the set up and launch of the fund, training, disbursement, and reporting</p>	<p>Financial report for the Short-Term Economic Payments Fund, including member ID, date of the payment, status of the payment, payment method, and payment amount.</p> <p>A report with the following information provided in aggregate for all individuals who received assistance through the Short-Term Economic Payments Fund : residential zip code, age, race, gender identity, household size, occupation, and the proposed use of the funds.</p>	<p>No later than 90 days after the last payment is disbursed to Members through the Short-Term Economic Payments Fund (either option)</p>

A. **Payment.** The City shall pay to the Contractor in full payment for services satisfactorily performed at the rate of two million three hundred fifty four thousand six hundred fifty dollars (\$2,354,650) allocated to the One-Time Economic Relief Fund and Short-Term Economic Payments Funds and (\$145,350) for performing the services set forth in Exhibit A Scope of Work. This amount is a maximum and not a guarantee that the work assigned to be performed by Contractor under this Agreement shall equal the amount stated herein. The Parties do not intend for the Contractor to continue to provide Services without compensation when the total compensation amount is reached. Contractor is responsible for notifying the City when the

Services provided under this Agreement reach the total compensation amount. In no event will the Contractor be paid for Services provided in excess of the total compensation amount without this Agreement being amended in writing prior to services, in excess of the total compensation amount being provided.

C. Payment shall be made according to the schedule set forth in Section 3. above. i. Payment will be made to the Contractor's designated mailing address. In accordance with Section 13-1-158 NMSA 1978, payment shall be tendered to the Contractor within thirty (30) days of the date of written certification of Acceptance. All Payment Invoices MUST BE received by the City no later than fifteen (15) days after the termination of this Agreement. Payment Invoices received after such date WILL NOT BE PAID.

D. Retainage, Not Applicable – The Parties agree there is no retainage.

F. The contractor may use SLFRF funds to cover eligible costs incurred during the period that begins on March 3, 2021 and ends on December 31, 2024, if the award funds for the obligations incurred by December 31, 2024 are expended by December 31, 2026. Costs for projects incurred by the subrecipient prior to March 3, 2021 are not eligible, as provided for in Treasury's final rule. Any funds not obligated or expended for eligible uses by the timelines above must be returned to Treasury, including any unobligated or unexpended funds that have been provided to subrecipients and contractors as part of the award closeout process pursuant to 2 C.F.R. 200.344(d).

4. Term

THIS AGREEMENT SHALL NOT BECOME EFFECTIVE UNTIL APPROVED IN WRITING BY THE CITY. This Agreement shall begin on date approved by the City and end on December 31, 2024. In no event will the term exceed the duration allowed by statute, NMSA 1978, § 13-1-150.

5. Default and Force Majeure

The City reserves the right to cancel all or any part of any orders placed under this contract without cost to the City with the exception of direct, unrestricted cash assistance already committed to eligible Santa Fe County and City of Santa Fe residents through Contractor's UpTogether platform, if the Contractor fails to meet the provisions of this contract and, except as otherwise provided herein, to hold the Contractor liable for any excess cost occasioned by the City due to the Contractor's default. The Contractor shall not be liable for any excess costs if failure to perform the order arises out of causes beyond the control and without the fault or negligence of the Contractor; such causes include, but are not restricted to, acts of God or the public enemy, acts of the State or Federal Government, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, unusually severe weather and defaults of sub-contractors due to any of the above, unless the City shall determine that the supplies or services to be furnished by the sub-contractor were obtainable from other sources in sufficient time to permit the Contractor to meet the required delivery scheduled. The rights and remedies of the City

provided in this paragraph shall not be exclusive and are in addition to any other rights now being provided by law or under this contract.

6. Termination

A. Grounds. The City may terminate this Agreement for convenience or cause. The Contractor may only terminate this Agreement based upon the City's uncured, material breach of this Agreement.

B. Notice; City Opportunity to Cure.

1) Except as otherwise provided in Paragraphs 7.A and 17, the City shall give Contractor written notice of termination at least thirty (30) days prior to the intended date of termination.

2) Contractor shall give City written notice of termination at least thirty (30) days prior to the intended date of termination, which notice shall (i) identify all the City's material breaches of this Agreement upon which the termination is based and (ii) state what the City must do to cure such material breaches. Contractor's notice of termination shall only be effective (i) if the City does not cure all material breaches within the thirty (30) day notice period or (ii) in the case of material breaches that cannot be cured within thirty (30) days, the City does not, within the thirty (30) day notice period, notify the Contractor of its intent to cure and begin with due diligence to cure the material breach.

3) Notwithstanding the foregoing, this Agreement may be terminated immediately upon written notice to the Contractor (i) if the Contractor becomes unable to perform the services contracted for, as determined by the City; (ii) if, during the term of this Agreement, the Contractor is suspended or debarred by the City; or (iii) the Agreement is terminated pursuant to Paragraph 17, "Appropriations", of this Agreement.

C. Liability. Except as otherwise expressly allowed or provided under this Agreement, the City's sole liability upon termination shall be to pay for acceptable work performed prior to the Contractor's receipt or issuance of a notice of termination including direct, unrestricted cash assistance already committed to eligible Santa Fe County and City of Santa Fe residents through Contractor's UpTogether platform; provided, however, that a notice of termination shall not nullify or otherwise affect either party's liability for pre-termination defaults under or breaches of this Agreement. The Contractor shall submit an invoice for such work within thirty (30) days of receiving or sending the notice of termination. *THIS PROVISION IS NOT EXCLUSIVE AND DOES NOT WAIVE THE CITY'S OTHER LEGAL RIGHTS AND REMEDIES CAUSED BY THE CONTRACTOR'S DEFAULT/BREACH OF THIS AGREEMENT.*

7. Amendment

A. This Agreement shall not be altered, changed or amended except by instrument in writing executed by the parties hereto and all other required signatories.

B. If the City proposes an amendment to the Agreement to unilaterally reduce funding due to budget or other considerations, the Contractor shall, within thirty (30) days of receipt of the proposed Amendment, have the option to terminate the Agreement, pursuant to the termination provisions as set forth in Paragraph 7 herein, or to agree to the reduced funding.

8. **Status of Contractor**

The Contractor, and Contractor's agents and employees, are independent Contractors for the City and are not employees of the City. The Contractor, and Contractor's agents and employees, shall not accrue leave, retirement, insurance, bonding, use of City vehicles, or any other benefits afforded to employees of the City as a result of this Agreement. The Contractor acknowledges that all sums received hereunder are personally reportable by the Contractor for income tax purposes, including without limitation, self-employment tax and business income tax. The Contractor agrees not to purport to bind the City unless the Contractor has written authority to do so, and then only within the strict limits of that authority.

9. **Assignment**

The Contractor shall not assign or transfer any interest in this Agreement or assign any claims for money due or to become due under this Agreement without the *prior written approval* of the City.

10. **Subcontracting**

The Contractor shall not subcontract any portion of the services to be performed under this Agreement without the prior written approval of the City. The City approves in advance the use of website technical support subconsultants that may assist Fund applicants in using UpTogether's Community platform. No such subcontract shall relieve the primary Contractor from its obligations and liabilities under this Agreement, nor shall any subcontract obligate direct payment from the City.

11. **Non-Collusion**

In signing this Agreement, the Contractor/Contractor certifies the Contractor/Contractor has not, either directly or indirectly, entered into action in restraint of free competitive bidding in connection with this offer submitted to the City.

12. **Inspection of Plant**

The City may inspect, at any reasonable time during Contractor's regular business hours and upon prior written notice, the Contractor's plant or place of business, or any subcontractor's plant or place of business, which is related to the performance of this contract.

13. **Commercial Warranty**

The Contractor agrees that the tangible personal property or services furnished under this Agreement shall be covered by the most favorable commercial warranties the Contractor gives to any customer for such tangible personal property or services, and that the rights and remedies provided herein shall extend to the City and are in addition to and do not limit any rights afforded to the City by any other clause of this order. Contractor agrees not to disclaim warranties of fitness for a particular purpose or merchantability.

14. **Condition of Proposed Items**

Where tangible personal property is a part of this Agreement, all proposed items are to be NEW and of most current production, unless otherwise specified.

15. **Records and Audit**

During the term of this Agreement and for five years thereafter, the Contractor shall maintain detailed records pertaining to the services rendered and products delivered. These records shall be subject to inspection by the City, the State Auditor and other appropriate state and federal authorities. The City shall have the right to audit billings both before and after payment. Payment under this Agreement shall not foreclose the right of the City to recover excessive or illegal payments.

16. **Appropriations**

The terms of this Agreement, and any orders placed under it, are contingent upon sufficient appropriations and authorization being made by the City Council for the performance of this Agreement. If sufficient appropriations and authorization are not made by the legislature, this Agreement, and any orders placed under it, shall terminate upon written notice being given by the City to the Contractor. The City's decision as to whether sufficient appropriations are available shall be accepted by the Contractor and shall be final. If the City proposes an amendment to the Agreement to unilaterally reduce funding, the Contractor shall have the option to terminate the Agreement or to agree to the reduced funding, within thirty (30) days of receipt of the proposed amendment.

17. **Release**

The Contractor, upon final payment of the amount due under this Agreement, releases the City, its officers and employees, from all liabilities, claims and obligations whatsoever arising from or under this Agreement. The Contractor agrees not to purport to bind the City, unless the Contractor has express written authority to do so, and then only within the strict limits of that authority.

18. **Confidentiality**

Any confidential information provided to or developed by the Contractor in the performance of this Agreement shall be kept confidential and shall not be made available to any individual or organization by the Contractor without prior written approval by the City.

19. **Conflict of Interest**

A. The Contractor represents and warrants that it presently has no interest and, during the term of this Agreement, shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance or services required under the

Agreement. The Contractor shall comply with any applicable provisions of the New Mexico Governmental Conduct Act and the New Mexico Financial Disclosures Act.

B. The Contractor further represents and warrants that it has complied with, and, during the term of this Agreement, will continue to comply with, and that this Agreement complies with all applicable provisions of the Governmental Conduct Act, Chapter 10, Article 16 NMSA 1978.

C. Contractor's representations and warranties in Paragraphs A and B of this Paragraph are material representations of fact upon which the City relied when this Agreement was entered into by the parties. Contractor shall provide immediate written notice to the City if, at any time during the term of this Agreement, Contractor learns that Contractor's representations and warranties in Paragraphs A and B of this Paragraph 20 were erroneous on the effective date of this Agreement or have become erroneous by reason of new or changed circumstances. If it is later determined that Contractor's representations and warranties in Paragraphs A and B of this Paragraph 20 were erroneous on the effective date of this Agreement or have become erroneous by reason of new or changed circumstances, in addition to other remedies available to the City and notwithstanding anything in the Agreement to the contrary, the City may immediately terminate the Agreement.

D. All terms defined in the Governmental Conduct Act have the same meaning in this section.

20. **Approval of Contractor Representative(s)**

The City reserves the right to require a change in Contractor representative(s) if the assigned representative(s) are not, in the opinion of the City, adequately serving the needs of the City.

21. **Scope of Agreement; Merger**

This Agreement incorporates all the agreements, covenants, and understandings between the parties hereto concerning the subject matter hereof, and all such covenants, agreements and understandings have been merged into this written Agreement. No prior agreements or understandings, verbal or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

22. **Notice**

The Procurement Code, Sections 13-1-28 through 13-1-199 NMSA 1978, imposes civil and criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for bribes, gratuities and kickbacks.

23. **Equal Opportunity Compliance**

The Contractor agrees to abide by all federal and state laws, and local Ordinances,

pertaining to equal employment opportunity. In accordance with all such laws, rules, and regulations, the Contractor agrees to assure that no person in the United States shall on the grounds of race, religion, color, national origin, ancestry, sex, age, physical or mental handicap, or serious medical condition, spousal affiliation, sexual orientation or gender identity, be excluded from employment with or participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity performed under this Agreement. If Contractor is found not to be in compliance with these requirements during the life of this Agreement, Contractor agrees to take appropriate steps to correct these deficiencies.

24. **Indemnification**

The Contractor shall hold the City and its employees harmless and shall indemnify the City and its employees against any and all claims, suits, actions, liabilities and costs of any kind, including attorney's fees for personal injury or damage to property arising from the acts or omissions of the Contractor, its agents, officers, employees or subcontractors. The Contractor shall not be liable for any injury or damage as a result of any negligent act or omission committed by the City, its officers or employees.

25. **New Mexico Tort Claims Act**

Any liability incurred by the City of Santa Fe in connection with this Agreement is subject to the immunities and limitations of the New Mexico Tort Claims Act, Section 41-4-1, et. seq. NMSA 1978, as amended. The City and its "public employees" as defined in the New Mexico Tort Claims Act, do not waive sovereign immunity, do not waive any defense and do not waive any limitation of liability pursuant to law. No provision in this Agreement modifies or waives any provision of the New Mexico Tort Claims Act.

26. **Applicable Law**

The laws of the State of New Mexico shall govern this Agreement, without giving effect to its choice of law provisions. Venue shall be proper only in a New Mexico court of competent jurisdiction in accordance with NMSA 1978, § 38-3-2. By execution of this Agreement, Contractor acknowledges and agrees to the jurisdiction of the courts of the State of New Mexico over any and all lawsuits arising under or out of any term of this Agreement.

27. **Limitation of Liability**

The Contractor's liability to the City, for any cause whatsoever shall be limited to the purchase price paid to the Contractor for the products and services that are the subject of the City's claim. The foregoing limitation does not apply to paragraph 25 of this Agreement or to damages resulting from personal injury caused by the Contractor's negligence.

28. **Incorporation by Reference and Precedence**

If this Agreement has been procured pursuant to a request for proposals, this Agreement is derived from (1) the request for proposal, (including any written clarifications to the request

for proposals and any City response to questions); (2) the Contractor's best and final offer; and (3) the Contractor's response to the request for proposals.

In the event of a dispute under this Agreement, applicable documents will be referred to for the purpose of clarification or for additional detail in the following order of precedence: (1) amendments to the Agreement in reverse chronological order; (2) the Agreement, including the scope of work and all terms and conditions thereof; (3) the request for proposals, including attachments thereto and written responses to questions and written clarifications; (4) the Contractor's best and final offer if such has been made and accepted by the City; and (5) the Contractor's response to the request for proposals.

29. **Workers' Compensation**

The Contractor agrees to comply with state laws and rules applicable to workers' compensation benefits for its employees. If the Contractor fails to comply with the Workers' Compensation Act and applicable rules when required to do so, this Agreement may be terminated by the City.

30. **Inspection**

If this contract is for the purchase of tangible personal property (goods), final inspection and acceptance shall be made at Destination. Tangible personal property rejected at Destination for non-conformance to specifications shall be removed at Contractor's risk and expense promptly after notice of rejection and shall not be allowable as billable items for payment.

31. **Inspection of Services**

If this contract is for the purchase of services, the following terms shall apply.

A. Services, as used in this Article, include services performed, workmanship, and material furnished or utilized in the performance of services.

B. The Contractor shall provide and maintain an inspection system acceptable to the City covering the services under this Agreement. Complete records of all inspection work performed by the Contractor shall be maintained and made available to the City and for as long thereafter as the Agreement requires. The City has the right to inspect and test all services contemplated under this Agreement to the extent practicable at all times and places during the term of the Agreement. The City shall perform inspections and tests in a manner that will not unduly delay or interfere with Contractor's performance.

C. If the City performs inspections or tests on the premises of the Contractor or a subcontractor, the Contractor shall furnish, and shall require subcontractors to furnish, at no increase in contract price, all reasonable facilities and assistance for the safe and convenient performance of such inspections or tests.

D. If any part of the services do not conform with the requirements of this Agreement, the City may require the Contractor to re-perform the services in conformity with the requirements of this Agreement at no increase in contract amount. When the defects in services cannot be corrected by re-performance, the City may:

- (1) require the Contractor to take necessary action(s) to ensure that future performance conforms to the requirements of this Agreement; and
- (2) reduce the contract price to reflect the reduced value of the services performed.

E. If the Contractor fails to promptly re-perform the services or to take the necessary action(s) to ensure future performance in conformity with the requirements of this Agreement, the City may:

- (1) by contract or otherwise, perform the services and charge to the Contractor any cost incurred by the City that is directly related to the performance of such service; or
- (2) terminate the contract for default.

32. Insurance

If the services contemplated under this Agreement will be performed on or in City facilities or property, Contractor shall maintain in force during the entire term of this Agreement, the following insurance coverage(s), naming the City as additional insured.

A. Commercial General Liability insurance shall be written on an occurrence basis and be as broad as ISO Form CG 00 01 with limits not less than \$2,000,000 per occurrence and \$2,000,000 in the aggregate for claims against bodily injury, personal and advertising injury, and property damage. Said policy shall include broad form Contractual Liability coverage and be endorsed to name the City of Santa Fe their officials, officers, employees, and agents as additional insureds.

B. Broader Coverage and Limits. The insurance requirements under this Agreement shall be the greater of (1) the minimum coverage and limits specified in this Agreement, or (2) the broader coverage and maximum limits of coverage of any insurance policy or proceeds available to the Named Insured. It is agreed that these insurance requirements shall not in any way act to reduce coverage that is broader or that includes higher limits than the minimums required herein. No representation is made that the minimum insurance requirements of this Agreement are sufficient to cover the obligations of Contractor hereunder.

C. Contractor shall maintain the above insurance for the term of this Agreement and name the City as an additional insured and provide for 30 days cancellation notice on any Certificate of Insurance form furnished by Contractor. Such certificate shall also specifically state the coverage provided under the policy is primary over any other valid and collectible insurance and provide a waiver of subrogation.

33. Impracticality of Performance

A party shall be excused from performance under this Agreement for any period that the party is prevented from performing as a result of an act of God, strike, war, civil disturbance, epidemic, or court order, provided that the party has prudently and promptly acted to take any and all steps that are within the party's control to ensure performance. Subject to this provision, such non-performance shall not be deemed a default or a ground for termination.

34. **Invalid Term or Condition**

If any term or condition of this Agreement shall be held invalid or unenforceable, the remainder of this Agreement shall not be affected and shall be valid and enforceable.

35. **Enforcement of Agreement**

A party's failure to require strict performance of any provision of this Agreement shall not waive or diminish that party's right thereafter to demand strict compliance with that or any other provision. No waiver by a party of any of its rights under this Agreement shall be effective unless express and in writing, and no effective waiver by a party of any of its rights shall be effective to waive any other rights.

36. **Patent, Copyright and Trade Secret Indemnification**

A. The Contractor shall defend, at its own expense, the City against any claim that any product or service provided under this Agreement infringes any patent, copyright to trademark in the United States or Puerto Rico, and shall pay all costs, damages and attorneys' fees that a court finally awards as a result of any such claim. In addition, if any third party obtains a judgment against the City based upon Contractor's trade secret infringement relating to any product or services provided under this Agreement, the Contractor agrees to reimburse the City for all costs, attorneys' fees and amount of the judgment. To qualify for such defense and or payment, the City shall:

- 1) give the Contractor prompt written notice within 48 hours of any claim;
- 2) allow the Contractor to control the defense of settlement of the claim; and
- 3) cooperate with the Contractor in a reasonable way to facilitate the defense or settlement of the claim.

B. If any product or service becomes, or in the Contractor's opinion is likely to become the subject of a claim of infringement, the Contractor shall at its option and expense:

- 1) provide the City the right to continue using the product or service and fully indemnify the City against all claims that may arise out of the City's use of the product or service;
 - 2) replace or modify the product or service so that it becomes non-infringing;
- or,
- 3) accept the return of the product or service and refund an amount equal to the value of the returned product or service, less the unpaid portion of the purchase price and any other amounts, which are due to the Contractor. The Contractor's obligation will be void as to any product or service modified by the City to the extent such modification is the cause of the claim.

37. **Survival**

The Agreement paragraphs titled "Patent, Copyright, Trademark, and Trade Secret

Indemnification; Indemnification; and Limit of Liability” shall survive the expiration of this Agreement. Software licenses, leases, maintenance and any other unexpired Agreements that were entered into under the terms and conditions of this Agreement shall survive this Agreement.

38. Disclosure Regarding Responsibility

A. Any prospective Contractor and any of its Principals who enter into a contract greater than sixty thousand dollars (\$60,000.00) with any City for professional services, tangible personal property, services or construction agrees to disclose whether the Contractor, or any principal of the Contractor’s company is presently debarred, suspended, proposed for debarment, or declared ineligible for award of contract by any federal entity, state agency or local public body.

B. Principal, for the purpose of this disclosure, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity or related entities.

C. The Contractor shall provide immediate written notice to the City if, at any time during the term of this Agreement, the Contractor learns that the Contractor’s disclosure was at any time erroneous or became erroneous by reason of changed circumstances.

D. A disclosure that any of the items in this requirement exist will not necessarily result in termination of this Agreement. However, the disclosure will be considered in the determination of the Contractor’s responsibility and ability to perform under this Agreement. Failure of the Contractor to furnish a disclosure or provide additional information as requested will be grounds for immediate termination of this Agreement pursuant to the conditions set forth in Paragraph 7 of this Agreement.

E. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the disclosure required by this document. The knowledge and information of a Contractor is not required to exceed that which is the normally possessed by a prudent person in the ordinary course of business dealings.

F. The disclosure requirement provided is a material representation of fact upon which reliance was placed when making an award and is a continuing material representation of the facts during the term of this Agreement. If during the performance of the contract, the Contractor is indicted for or otherwise criminally or civilly charged by any government entity (federal, state or local) with commission of any offenses named in this document the Contractor must provide immediate written notice to the City. If it is later determined that the Contractor *knowingly rendered an erroneous disclosure*, in addition to other remedies available to the Government, the City may terminate the involved contract for cause. Still further the City may suspend or debar the Contractor from eligibility for future solicitations until such time as the matter is resolved to the satisfaction of the City.

39. Suspension, Delay or Interruption of Work

The City may, without cause, order the Contractor, in writing, to suspend, delay or

interrupt the work in whole or in part for such period as the City may determine. The contract sum and contract time shall be adjusted for increases in cost and/or time associated with Contractor's compliance therewith. Upon receipt of such notice, Contractor shall leave the jobsite and any equipment in a safe condition prior to departing. Contractor must assert rights to additional compensation within thirty (30) days after suspension of work is lifted and return to work is authorized. Any compensation requested for which entitlement is granted and the contract sum adjusted, shall have profit included (for work completed) and for cost only (not profit) for Contractor costs incurred directly tied to the suspension itself and not otherwise covered by Contract remedy. Any change in Total Compensation must be reflected in an Amendment executed pursuant to Section 8 of this Agreement.

40. Notification

Either party may give written notice to the other party in accordance with the terms of this Paragraph. Any written notice required or permitted to be given hereunder shall be deemed to have been given on the date of delivery if delivered by personal service or hand delivery or three (3) business days after being mailed.

To the City:

Julie Sanchez, Community Health and Safety Department, jjsanchez@santafenm.gov, PO Box 909, Santa Fe, NM 87501

To the Contractor:

Jesus Gerena, CEO, FII-National dba UpTogether, jesus@uptogether.org and compliance@uptogether.org, 663 13th Street, Suite 200, Oakland, CA 94612-1275

Either party may change its representative or address above by written notice to the other in accordance with the terms of this Paragraph. The carrier for mail delivery and notices shall be the agent of the sender.

To the Contractor:

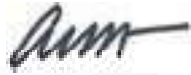
Jesus Gerena, CEO, FII-National dba UpTogether, jesus@uptogether.org and compliance@uptogether.org, 663 13th Street, Suite 200, Oakland, CA 94612-1275

41. Succession

This Agreement shall extend to and be binding upon the successors and assigns of the parties.

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the date of the signature by the required approval authorities below.

CITY OF SANTA FE:



ALAN M. WEBBER, MAYOR

DATE: Aug 4, 2023

CONTRACTOR:

FII-NATIONAL dba UPTOGETHER



Michelle Chao-Nguyen, Chief People Officer

DATE: 6/21/23

CRS#03-342595-00-7

Registration # 233939

Federal UEI # 873148568

ATTEST:



KRISTINE BUSTOS MIHELIC, CITY CLERK XIV

GB MTG 07/26/2023

CITY ATTORNEY'S OFFICE:



Marcos Martinez (Jun 21, 2023 10:19 MDT)

SENIOR ASSISTANT CITY ATTORNEY

APPROVED FOR FINANCES:



Emily K. Oster (Aug 3, 2023 22:58 MDT)

EMILY OSTER, FINANCE DIRECTOR

2400122.510400 AH
Org.Name/Org.# AH

COM222400B (\$1,500,000.00)

City ARPA Project Ledger #

COM2324003 (\$1,000,000.00)

County ARPA Project Ledger #

EXHIBIT A

Scope of Work

1) PROGRAM SCOPE AND CRITERIA

UpTogether shall provide direct, unrestricted cash assistance to eligible Santa Fe County and City of Santa Fe residents impacted by the economic hardships of the COVID pandemic through two funds: 1) One-Time Economic Relief, and 2) Short-term Economic Payments, as outlined below. UpTogether will distribute the cash through the UpTogether Community, a technology platform that transfers unrestricted cash investments directly to individuals through bank account transfer or UpTogether digital/physical card.

1. **One-Time Economic Relief Fund**

The funds will be distributed as direct financial assistance to eligible residents in the form of one-time payments (through ACH transfers and/or UpTogether digital/physical cards) of \$1,250. The payments will be unrestricted. The City will identify local nonprofit organizations in the CONNECT network to identify potential recipients and verify and document their eligibility, including income and indigency. Information and backup documentation will be stored and accessed through the CONNECT network. Individuals will be eligible if they meet the following criteria:

- The recipient resides in Santa Fe County;
- Have experienced financial hardship due to COVID-19 resulting in an inability to cover basic living expenses such as food, transportation, housing or medical expenses including one or more of the following:
 1. Meet at least one of the following conditions:
 - Experienced a reduction in hours between March 2020 and current;
 - Experienced unemployment at some point during the pandemic between March 2020 and current; and
 - Experienced a temporary job loss due to a workplace shut down because of COVID-19 outbreak or a New Mexico state imposed closure between July 1, 2020 and current; and
 - Accrued additional expenses due to COVID-19 sickness (i.e. quarantining, hospitalization, etc.)
- Meet the State's definition of indigent
- Are at least 18 years old, as screened by the UpTogether platform based on date of birth
- The City will work with local nonprofit organization(s) that they identify to verify the above criteria through documentation provided by the potential recipient. Documentation allowed by the City will be sufficiently broad to reduce the burden on applicants and ensure inclusion. UpTogether will not verify this information.
- Individuals will self-attest that only one individual in their household is submitting an application.

Additionally, only one award per household - defined as all the people who comprise one household, which can be a house, an apartment or a single room when it is occupied as separate living quarters - will be allowed. This will be verified by: 1) individuals will self-attest that only one individual in their household is submitting an application, and 2) UpTogether will only approve one award per unique street address.

Individuals can be selected for both the Short-term Economic Payments Fund (either the 9 month or 12 month option) and the One-Time Economic Relief Fund.

The nonprofit organizations will utilize their existing relationships to identify a set number of individuals to receive assistance and verify and document their eligibility as outlined above. Individuals can also be connected to a nonprofit organization by calling 2-1-1 or visiting the public portal. Individuals will then receive an alphanumeric invitation code that identifies them as eligible and allows them to access the direct cash assistance through a verification form on UpTogether's Community platform.

UpTogether's verification form will require individuals to provide their name; demographics (age, gender, race); household size; other learning questions as outlined below; mailing address; email address and/or phone number. They can submit the form via computer or smartphone. Individuals will also self attest on the form that they meet the above eligibility criteria and UpTogether will check the zip code provided in the verification form against the list of eligible zip codes from the City and County. UpTogether will also only approve one award per unique street address. The verification form will be available in English and Spanish.

Cash transfers will be made through the UpTogether Community in accordance with its policies and procedures, including UpTogether's Terms of Use Agreement on uptogether.org. As soon as the individual/family creates their virtual wallet via the UpTogether Community, UpTogether executes transfer to individual/family's USIO virtual wallet, where individual/family can choose how to transfer and/or use funds. Available options include ACH transfers to individual/family's account, virtual or physical pre-paid debit card, or paper check. Individuals who elect to receive UpTogether Cards will be advised upon issuance that the card expires after three years any unused forfeited cash transfers will be sent to the Unclaimed Property Department of the state in which the UpTogether Fund Member last resided in accordance with that state's dormancy and unclaimed property laws.

Individual/family has 60-days to successfully create their virtual wallet after being approved.

UpTogether will notify the individual immediately and advise them of the steps they need to take to receive their payment. A minimum of three notifications and reminders will be sent to the email address and/or phone number the individual has provided. Should they fail to create the virtual wallet or resolve any other payment issues within 60-days of their verification form being approved, they will forfeit their payment. The payment will be returned to the One-Time Economic Relief Fund for distribution to another eligible individual. One of the identified Connect partners will identify a new eligible individual. UpTogether will repeat this process up to three times to distribute all funds. Unfulfilled/forfeited cash transfers after the term of this Agreement shall be returned to the City.

At any point, individuals can visit our UpTogether Knowledge Center for assistance (available in English and Spanish).

The City can redirect any request for assistance they receive to our support team. There are three options to contact our support team:

- Live chat is open Monday through Thursday from 8:00 AM to 5:00 PM MST and Fridays from 8:00 AM to 3:00 PM MST.
- Ticket submission available 24/7: Due to the high volume of support requests, it may take up to four (4) business days for our agents to respond to a written support request.
- Phone line is open Monday through Thursday from 8:00 AM to 5:00 PM MST and Fridays from 8:00 AM to 3:00 PM MST.
- Note: these are our current hours and are subject to change. Our live chat and phone line will be closed all major holidays and from the day after Christmas through New Year's Eve.

Once all households are selected, UpTogether will provide a narrative report that includes, in aggregate for all households who received cash assistance: residential zip code, age, race, gender identity, household size, occupation, and the proposed use of the funds.

Verification Form Questions

All individuals provide:

- Full name
- Date of birth
- Phone number or email address
- Residential address

Other questions will include:

1. By selecting yes to this question, user asserts and verifies that they experienced a COVID-19-related financial hardship (e.g., reduced hours/lost job, unpaid leave).
 - a. Question type: Single select dropdown
 - b. Answer choices:
 - i. yes
 - c. Required: yes

2. By selecting yes to this question, I attest that I am the only individual from my household applying for the One-Time Economic Relief Fund.
 - a. Question type: Single select dropdown
 - b. Answer choices:
 - i. Yes
 - c. Required: yes

3. Question Text: Do you certify and declare that you meet at least one of the following conditions (choose all that apply):
 - a. Question Type: Multi Select Dropdown
 - b. Answer choices:
 - Experienced a reduction in hours between March 2020 and current
 - Experienced unemployment at some point during the pandemic between March 2020 and current
 - Accrued additional expenses due to COVID-19 sickness (i.e., quarantining, hospitalization, etc.)
 - Did not qualify for sick leave benefits or unemployment insurance benefits
 - Experienced a temporary job loss due to a workplace shut down because of COVID-19 outbreak or a New Mexico state imposed closure between July 1, 2020 and current
 - c. Required: yes

4. What is your racial background? Please select all that apply.
 - a. Question Type: Multiselect
 - b. Answer choices:
 - i. Asian
 - ii. Black or African American
 - iii. Hispanic or Latino/a/x

- iv. Indigenous peoples of the Americas
 - v. Middle Eastern or North African
 - vi. Native Hawaiian or Pacific Islander
 - vii. White or European
 - viii. Another race or ethnicity not listed above
 - ix. Prefer not to answer
- c. Required: yes; will not be used to confirm eligibility
5. What is your gender identity?
- a. Question Type: Single Select Dropdown
 - b. Answer Choices:
 - i. Female
 - ii. Gender non-conforming
 - iii. Genderqueer
 - iv. Male
 - v. Nonbinary
 - vi. Prefer to self identify
 - vii. Prefer not to answer
 - c. Required: yes; will not be used to confirm eligibility
6. How many people are in your household?
- a. Question Type: Integer, range requirement: 1-20
 - b. Required: yes; will not be used to confirm eligibility
7. Which of the following best describes your occupation?
- a. Question type: single select dropdown
 - b. Answer choices:
 - i. Business and Financial Operations
 - ii. Computer and Mathematical
 - iii. Office and Administrative Support
 - iv. Architecture and Engineering
 - v. Installation, maintenance, and repair
 - vi. Construction and extraction
 - vii. Healthcare practitioners
 - viii. Life, physical, and social science
 - ix. Farming, fishing, and forestry
 - x. Arts, design, entertainment, sports, and media
 - xi. Healthcare support
 - xii. Personal care and service
 - xiii. Production

- xiv. Food preparation and serving
- xv. Education, Training, and Library
- xvi. Protective Service
- xvii. Management
- xviii. Building and Grounds Cleaning
- xix. Sales
- xx. Legal
- xxi. Community and Social Services
- xxii. Transportation and Materials Moving
- xxiii. Technology
- xxiv. Other, Please describe _____
- xxv. Unemployed

c. Required: yes; will not be used to confirm eligibility

7. Question Text: How do you plan to use the funds from UpTogether?

a. Question Type: Multi-select

b. Answer Choices:

- 1. Rent
- 2. Utilities
- 3. Basic needs (household items, food, clothing, etc)
- 4. Childcare
- 5. Home improvements (such as repairs)
- 6. Education
- 7. Healthcare
- 8. Transportation
- 9. Technology
- 10. Leisure
- 11. Paying off debt
- 12. Savings
- 13. Investments for the future
- 14. Giving to others
- 15. Other bills not listed above
- 16. Other

c. Required: yes; will not be used to confirm eligibility

2. Short-term Economic Payments Fund (9 or 12 months)

UpTogether will distribute short-term economic payments of unrestricted cash to a total of 307 individuals/households through two options: 9 months of \$500 payments (total per individual: \$4,500) or 12 months of \$400 payments (total per individual: \$4,800).

9 months

UpTogether will distribute \$500 of unrestricted cash monthly for nine months via ACH transfers and/or UpTogether virtual/physical cards (total per individual: \$4,500). The City will identify local nonprofit organizations in Connect to identify potential recipients and verify and document their eligibility.

Individuals will be eligible if they meet the following criteria:

- Live in Santa Fe County or City of Santa Fe at time of selection
- Have experienced financial hardship due to COVID-19 resulting in an inability to cover basic living expenses such as food, transportation, housing or medical expenses
- Meet at least one of the criteria below:
 - Experienced a reduction in hours between March 2020 and current;
 - Experienced unemployment at some point during the pandemic between March 2020 and current;
 - Experienced a temporary job loss due to a workplace shut down because of COVID-19 outbreak or a New Mexico state imposed closure between July 1, 2020 and current;
 - Did not qualify for sick leave benefits or unemployment insurance benefits; or
 - Accrued additional expenses due to COVID-19 sickness (i.e. quarantining, hospitalization, etc.)
- Meet the State's definition of indigent
- Are at least 18 years old, as screened by the UpTogether platform based on date of birth.
- The City will work with local nonprofit organization(s) that they identify to verify the above criteria through documentation provided by the potential recipient. Documentation allowed by the City will be sufficiently broad to reduce the burden on applicants and ensure inclusion. UpTogether will not verify this information.
- Only one award per household - defined as all the people who occupy a single housing unit, which can be a house, an apartment or a single room when it is occupied as separate living quarters - will be allowed. This will be verified by: 1) individuals will self attest that only one individual in their household is submitting a verification form, and 2) UpTogether will only approve one award per unique street address.

The nonprofit organizations will utilize their existing relationships to identify a set number of individuals to receive assistance and verify and document their eligibility as outlined above. Individuals can also be connected to a nonprofit organization by calling 2-1-1 or visiting the public portal. Individuals will then receive an alphanumeric invitation code that identifies them as eligible and allows them to access the direct cash assistance through a verification form on UpTogether's Community platform.

UpTogether's verification form will require individuals to provide their name; demographics (age, gender, race); household size; other learning questions as outlined below; mailing address; email address and/or phone number. They can submit the form via computer or smartphone. Individuals will also self attest on the form that they meet the above eligibility criteria and UpTogether will check the zip code provided in the verification form against the list of eligible zip codes from the City and County. The verification form will be available in English and Spanish.

12 months

UpTogether will distribute \$400 of unrestricted cash monthly for twelve months via ACH transfers and/or UpTogether virtual/physical cards (total per individual: \$4,800). Individuals will be eligible if they meet the following criteria:

- Provide documentation that they live in the City of Santa Fe at time of selection. Individuals can provide a government ID that matches their current address or two pieces of secondary identification that match their current address such as: medical insurance card, auto insurance card, lease agreement, mortgage documents, property tax bill, utility bill (within the last three months), auto registration paperwork, bank statement (within the last three months), paycheck stub with imprinted information (within the last three months), public assistance card, voters registration, medical bills, or other reasonable document that verifies address.
- Self attest that they have experienced financial hardship due to COVID-19 resulting in an inability to cover basic living expenses such as food, transportation, housing or medical expenses
- Self attest that they are the primary caregiver of a child in the household under 18
- Self attest that they are enrolled at the Santa Fe Community College
- Self attest that they meet at least one of the criteria below:
 - Experienced a reduction in hours between March 2020 and current;
 - Experienced unemployment at some point during the pandemic between March 2020 and current;
 - Experienced a temporary job loss due to a workplace shut down because of COVID-19 outbreak or a New Mexico state imposed closure between July 1, 2020 and current;
 - Did not qualify for sick leave benefits or unemployment insurance benefits; or
 - Accrued additional expenses due to COVID-19 sickness (i.e. quarantining, hospitalization, etc.)
- Are at least 18 years old at the time of application, as screened by the UpTogether platform based on date of birth
- Provide documentation that their household earns 65% of Area Median Income (AMI) or less, as indicated in the table below. Examples of acceptable documentation include: most recent federal income tax form, most recent paycheck stub from employer, federal student aid application or Pell grant letter (12 month student pilot only), public assistance letter (SNAP, Medicaid, TANF, WIC, etc.), letter from employer with gross monthly income, bank statement showing income deposits/transactions, unemployment benefit statements, social security benefit statements, 1099-R or other pension or retirement fund withdrawal statements.

Household size	65% Maximum Annual Household Income (based on 2023 Area Median Income for the Santa Fe MSA, as determined by HUD)
1	\$38,870
2	\$44,395
3	\$49,920
4	\$55,445
5	\$59,930
6	\$64,350
7	\$68,770

8 or more	\$73,190
-----------	----------

- Only one award per household - defined as all the people who occupy a single housing unit, which can be a house, an apartment or a single room when it is occupied as separate living quarters - will be allowed. This will be verified by: 1) individuals will self attest that only one individual in their household is submitting a verification form, and 2) UpTogether will only approve one award per unique street address.

UpTogether will open a verification form to the public for a period of time mutually agreed upon with the City for households to apply to receive funds. In the verification form, households will answer questions and upload address and income documentation to demonstrate eligibility. They can submit the form via computer or smartphone. The verification form will be available in English and Spanish.

Required information will include name of applicant; demographics (age, gender, race/ethnicity); household size; mailing address; email address and/or phone number; documentation of residency in City of Santa Fe; documentation of household income; and self-attestation that applicants meet the other criteria (experienced financial hardship due to COVID-19; are a primary caregiver of a child under 18; are enrolled at Santa Fe Community College; and are the only individual in their household applying).

The City and UpTogether will work with the Santa Fe Community College to promote the opportunity among individuals and families who meet the eligibility criteria and inform them of how to apply.

Some households will be immediately denied upon submission because their zip code is not eligible. Once the submission period closes, the remaining are the pool of eligible households that will enter the randomization process. The randomization will occur each time an UpTogether Support Agent reviews a verification form. When an UpTogether Support Agent requests a verification form to review, a random number generator will assign all forms in the eligible pool a number and the Agent then receives the form with the lowest number for review. The Agent reviews the verification form to confirm eligibility criteria. UpTogether Support Agents will follow this process until 98 individuals and families are selected. The remaining people will be notified by email or text message (based on the contact information they submitted when they applied) that they were not selected in the process.

To protect against fraud, the automated pre-checks in our application verification process look for matches across all verification forms for all funds for anyone (besides the exact member) with:

- An identical IP address
- An evidence document nearly identical

These are flagged for further review by our Support team.

Both Options (9 and 12 months)

Individuals can be selected for both the Short-term Economic Payments Fund and the One-Time Economic Relief Fund. However, individuals can only be selected for the 9 month or 12 month option under the Short-term Economic Payments Fund.

Once the form is submitted and the individual is approved, the first payment of \$400 or \$500 will be processed and the individual will be automatically enrolled to receive an additional eight or 11 payments. There will be no conditions for individuals to remain eligible for the payments.

Cash transfers will be made through the UpTogether Community in accordance with its policies and procedures. As soon as the individual/family creates their virtual wallet via the UpTogether Community, UpTogether executes transfer to individual/family's USIO virtual wallet, where individual/family can choose how to transfer and/or use funds. Available options include ACH transfers to individual/family's account, virtual or physical pre-paid debit card, or paper check. Individuals who elect to receive UpTogether Cards will be advised upon issuance that the card expires after three years any unused forfeited cash transfers will be sent to the Unclaimed Property Department of the state in which the UpTogether Fund Member last resided in accordance with that state's dormancy and unclaimed property laws.

Individual/family has 60-days to successfully create their virtual wallet after being approved. UpTogether will notify the individual immediately and advise them of the steps they need to take to receive their payment. A minimum of three notifications and reminders will be sent to the email address and/or phone number the individual has provided. Should they fail to create the virtual wallet or resolve any other payment issues within 60-days of their verification form being approved, they will forfeit their payment. After an individual/family forfeits two payments, their participation in the Fund will be terminated and they will no longer be eligible to receive recurring payments. Unfulfilled/forfeited cash transfers during the term of this Agreement will be restored to the Short-term Economic Payments Fund and UpTogether will work with the City of Santa Fe to redeploy those dollars to individuals eligible for the Short-term Economic Payment Fund. Depending on the amount of forfeited funds available for redeployment, newly selected individuals may receive fewer than nine payments of \$500 or twelve payments of \$400, such as potentially a one-time payment of \$500 or \$400. Unfulfilled/forfeited cash transfers after the term of this Agreement shall be returned to the City.

Once all households are selected, UpTogether will provide a narrative report that includes, in aggregate for all households who received cash assistance: residential zip code, age, race, gender identity, household size, occupation, and the proposed use of the funds.

Verification Form Questions – 9 Months

All individuals provide:

- Full name
- Date of birth
- Phone number or email address
- Residential address

Other questions will include:

1. By selecting yes to this question, user asserts and verifies that they experienced a COVID-19-related financial hardship (e.g., reduced hours/lost job, unpaid leave)
 - d. Question type: Single select dropdown
 - e. Answer choices:
 - i. yes
 - f. Required: yes

8. By selecting yes to this question, I attest that I am the only individual from my household applying for the Short-Term Economic Payments Fund: 9 months.
 - a. Question type: Single select dropdown
 - b. Answer choices:
 - i. Yes
 - c. Required: yes

9. Question Text: Do you certify and declare that you meet at least one of the following conditions (choose all that apply):
- a. Question Type: Multi Select Dropdown
- b. Answer choices:
- i. Experienced a reduction in hours between March 2020 and current
 - ii. Experienced unemployment at some point during the pandemic between March 2020 and current
 - iii. Accrued additional expenses due to COVID-19 sickness (i.e., quarantining, hospitalization, etc.)
 - iv. Did not qualify for sick leave benefits or unemployment insurance benefits
 - v. Experienced a temporary job loss due to a workplace shut down because of COVID-19 outbreak or a New Mexico state imposed closure between July 1, 2020 and current
- c. Required: yes
10. What is your racial background? Please select all that apply.
- a. Question Type: Multiselect
- b. Answer choices:
- i. Asian
 - ii. Black or African American
 - iii. Hispanic or Latino/a/x
 - iv. Indigenous peoples of the Americas
 - v. Middle Eastern or North African
 - vi. Native Hawaiian or Pacific Islander
 - vii. White or European
 - viii. Another race or ethnicity not listed above
 - ix. Prefer not to answer
- c. Required: yes; will not be used to confirm eligibility
5. What is your gender identity?
- a. Question Type: Single Select Dropdown
- b. Answer Choices:
- i. Female
 - ii. Gender non-conforming
 - iii. Genderqueer
 - iv. Male
 - v. Nonbinary
 - vi. Prefer to self identify
 - vii. Prefer not to answer
- c. Required: yes; will not be used to confirm eligibility
6. How many people are in your household?
- a. Question Type: Integer, range requirement: 1-20
- b. Required: yes; will not be used to confirm eligibility
11. Which of the following best describes your occupation?
- a. Question type: single select dropdown
- b. Answer choices:
- i. Business and Financial Operations
 - ii. Computer and Mathematical
 - iii. Office and Administrative Support
 - iv. Architecture and Engineering

- v. Installation, maintenance, and repair
- vi. Construction and extraction
- vii. Healthcare practitioners
- viii. Life, physical, and social science
- ix. Farming, fishing, and forestry
- x. Arts, design, entertainment, sports, and media
- xi. Healthcare support
- xii. Personal care and service
- xiii. Production
- xiv. Food preparation and serving
- xv. Education, Training, and Library
- xvi. Protective Service
- xvii. Management
- xviii. Building and Grounds Cleaning
- xix. Sales
- xx. Legal
- xxi. Community and Social Services
- xxii. Transportation and Materials Moving
- xxiii. Technology
- xxiv. Other, Please describe _____
- xxv. Unemployed

b. Required: yes; will not be used to confirm eligibility

12. Question Text: How do you plan to use the funds from UpTogether?

a. Question Type: Multi-select

b. Answer Choices:

- i. Rent
- ii. Utilities
- iii. Basic needs (household items, food, clothing, etc)
- iv. Childcare
- v. Home improvements (such as repairs)
- vi. Education
- vii. Healthcare
- viii. Transportation
- ix. Technology
- x. Leisure
- xi. Paying off debt
- xii. Savings
- xiii. Investments for the future
- xiv. Giving to others
- xv. Other bills not listed above

Verification Form Questions – 12 Months:

All individuals provide:

- Full name
- Date of birth
- Phone number or email address
- Residential address
- Documentation of address to verify they live in the City of Santa Fe
- Documentation of income to verify their household earns an income at or below 65% of AMI

Other questions will include:

1. By selecting yes to this question, user asserts and verifies that they experienced a COVID-19-related financial hardship (e.g., reduced hours/lost job, unpaid leave)
 - a. Question type: Single select dropdown
 - b. Answer choices:
 - i. yes
 - c. Required: yes

2. By selecting yes to this question, I attest that I am the only individual from my household applying for the Short-Term Economic Payments Fund: 12 months.
 - a. Question type: Single select dropdown
 - b. Answer choices:
 - i. Yes
 - c. Required: yes

3. Question Text: Do you certify and declare that you meet at least one of the following conditions (choose all that apply):
 - a. Question Type: Multi Select Dropdown
 - b. Answer choices:
 - i. Experienced a reduction in hours between March 2020 and current
 - ii. Experienced unemployment at some point during the pandemic between March 2020 and current
 - iii. Accrued additional expenses due to COVID-19 sickness (i.e., quarantining, hospitalization, etc.)
 - iv. Did not qualify for sick leave benefits or unemployment insurance benefits
 - v. Experienced a temporary job loss due to a workplace shut down because of COVID-19 outbreak or a New Mexico state imposed closure between July 1, 2020 and current
 - c. Required: yes

4. Do you certify and declare that you are the primary caregiver of a child in the household under 18 and are enrolled at the Santa Fe Community College?
 - a. Question Type: Single select dropdown
 - b. Answer choices:
 - i. Yes
 - ii. Required: yes

5. What is your racial background? Please select all that apply.
 - a. Question Type: Multiselect
 - b. Answer choices:
 - i. Asian
 - ii. Black or African American
 - iii. Hispanic or Latino/a/x
 - iv. Indigenous peoples of the Americas
 - v. Middle Eastern or North African
 - vi. Native Hawaiian or Pacific Islander
 - vii. White or European
 - viii. Another race or ethnicity not listed above
 - ix. Prefer not to answer

- c. Required: yes; will not be used to confirm eligibility
6. What is your gender identity?
- a. Question Type: Single Select Dropdown
 - b. Answer Choices:
 - i. Female
 - ii. Gender non-conforming
 - iii. Genderqueer
 - iv. Male
 - v. Nonbinary
 - vi. Prefer to self identify
 - vii. Prefer not to answer
 - c. Required: yes; will not be used to confirm eligibility
7. How many people are in your household?
- a. Question Type: Integer, range requirement: 1-20
 - b. Required: yes; will not be used to confirm eligibility
8. Question Text: How do you plan to use the funds from UpTogether?
- a. Question Type: Multi-select
 - b. Answer Choices:
 - i. Rent
 - ii. Utilities
 - iii. Basic needs (household items, food, clothing, etc)
 - iv. Childcare
 - v. Home improvements (such as repairs)
 - vi. Education
 - vii. Healthcare
 - viii. Transportation
 - ix. Technology
 - x. Leisure
 - xi. Paying off debt
 - xii. Savings
 - xiii. Investments for the future
 - xiv. Giving to others
 - xv. Other bills not listed above

EXHIBIT B

Budget

	One-Time Economic Relief to allow families to respond to the public health emergency, such as medical expenses, expenses of actions to facilitate compliance with COVID-19-related public health measures, such as social distancing.	Short-Term Economic Payments to allow families to stabilize during the public health emergency, such as medical expenses, expenses of actions to facilitate compliance with COVID-19-related public health measures, such as social distancing.
Direct payments to families	\$943,750 (\$1,250.00 to 755 households)	\$940,500 (\$500 payments for 209 households for 9 months) \$470,400 (\$400 payments for 98 student households for 12 months)
6% cost paid to UpTogether for performing the services described in Exhibit A, Scope of Work including the set up and launch of the funds, training to nonprofit partners, disbursement of cash transfers, and reporting	\$56,250	\$89,100
Total	\$1,000,000	\$1,500,000











GB-Uptgether_Amend_2_Packet- (1)

Final Audit Report

2026-05-27

Created:	2026-05-26
By:	AP (aeperez@santafenm.gov)
Status:	Canceled / Declined
Transaction ID:	CBJCHBCAABAAFWJQYS2O8S_57FSrs15Q0D4TULryOYEh

"GB-Uptgether_Amend_2_Packet- (1)" History

-  Document created by ALYSSA PEREZ (aeperez@santafenm.gov)
2026-05-26 - 2:27:03 PM GMT- IP address: 50.228.218.220
-  Document emailed to ALYSSA PEREZ (aeperez@santafenm.gov) for filling
2026-05-26 - 2:29:59 PM GMT
-  Signer ALYSSA PEREZ (aeperez@santafenm.gov) entered name at signing as AP
2026-05-26 - 2:30:11 PM GMT- IP address: 50.228.218.220
-  Form filled by AP (aeperez@santafenm.gov)
Form filling Date: 2026-05-26 - 2:30:13 PM GMT - Time Source: server- IP address: 50.228.218.220 - Signature Appearance Selected: TYPE
-  Document emailed to Andrew Hopkins (ajhopkins@santafenm.gov) for signature
2026-05-26 - 2:30:18 PM GMT
-  Email viewed by Andrew Hopkins (ajhopkins@santafenm.gov)
2026-05-26 - 3:54:00 PM GMT- IP address: 104.47.65.254
-  Document e-signed by Andrew Hopkins (ajhopkins@santafenm.gov)
Signature Date: 2026-05-26 - 3:55:15 PM GMT - Time Source: server- IP address: 63.232.20.2 - Signature Appearance Selected: IMAGE
-  Document sent to JoAnn Lovato (jdlovato@santafenm.gov) and Travis Dutton-Leyda (tkduttonleyda@santafenm.gov) for signature. One of them to sign
2026-05-26 - 3:55:19 PM GMT
-  Email viewed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)
2026-05-26 - 5:31:31 PM GMT- IP address: 153.66.19.55
-  Document declined by JoAnn Lovato (jdlovato@santafenm.gov)
Decline reason: Attach approved Sole Source
2026-05-27 - 8:56:18 PM GMT- IP address: 73.228.7.52







Uptogether_Amend_2-Packet-_(1)-combined (1)

Final Audit Report

2026-06-18

Created:	2026-06-17
By:	JUAN VELA (jevela@santafenm.gov)
Status:	Canceled / Declined
Transaction ID:	CBJCHBCAABAAIPWNCdUu94CohTy_brJMbRnW7gklrpOn
Documents:	Uptogether_Amend_2-Packet-_(1)-combined (1).pdf (59 pages)

"Uptogether_Amend_2-Packet-_(1)-combined (1)" History

-  Document created by JUAN VELA (jevela@santafenm.gov)
2026-06-17 - 2:53:49 PM GMT- IP address: 63.232.20.2
-  Document sent to JoAnn Lovato (jdlovato@santafenm.gov) and Travis Dutton-Leyda (tkduttonleyda@santafenm.gov) for signature. One of them to sign
2026-06-17 - 2:56:34 PM GMT
-  Email viewed by JoAnn Lovato (jdlovato@santafenm.gov)
2026-06-17 - 7:20:22 PM GMT- IP address: 63.232.20.2
-  Document declined by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)
Decline reason: Remove my signature block from the vendor's letter please
2026-06-18 - 8:07:09 PM GMT- IP address: 63.232.20.2