

## The Purchasing Memo

**Date:** May 2, 2025

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

**From:** Christa Hernandez, Youth and Family Services Program Manager *Christa Hernandez*

**Via:** Henri Hammond-Paul, Community Health and Safety Director *HHHP*

**Subject:** Aspen Solutions Data Consultation Services

**Vendor Name:** Aspen Solutions LLC

**Munis Vendor Number:** 6094

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### ITEM AND ISSUE:

Community Health and Safety Department Request for Approval of a Professional Services Contract with Aspen Solutions LLC for the Purpose of Providing Data Consultation Services to Human Services Committee and Children and Youth Commission Grantees In the Total Amount of \$400,000.00 Including NMGRT through June 30, 2029; (Christa Hernandez, Youth and Family Services Program Manager; chernandez@santafenm.gov)

### CONTRACT NUMBER:

The FY25 Munis contract number is 3250560.

### BACKGROUND AND SUMMARY:

The City of Santa Fe released a Request for Proposal (RFP) solicitation on February 18, 2025, to solicit proposals from organizations to provide data consultation services and Results Based Accountability training and support to Human Services Committee (HSC) and Children and Youth Commission (CYC) grantees.

Aspen Solutions will assist grantees in tracking data measures linked to the strategic plans of either the Human Services Committee or the Children and Youth Commission. They will train all grantees on Results Based Accountability, a methodology utilized by both the Human Services Committee and the Children and Youth Commission, to develop a strategic framework which will identify funding priorities and related health and social determinant indicators for community health improvement. Aspen Solutions will also assist grantees in tracking the navigation services being provided by those organizations who are a part of CONNECT.

CONNECT is a network of navigators at clinics, community service organizations and city and county programs that link people to the services and resources they need to address social determinants of health. The vision of CONNECT is for all individuals in Santa Fe City and County, regardless of income, to have access to high-quality health care and are linked to the resources they need for health and well-being. The City of Santa Fe Community Services Department and Santa Fe County Community Services Department formalized their partnership for CONNECT, on November 10<sup>th</sup>, 2020, through City MOU #20-0629 or County Agreement No. 2020-0239-CSD/MM.

**PRIOR APPROVALS AND SUPPORTING INFORMATION:**

**FUNDING SOURCE:**

**Fund Name/Number:** Children and Youth Fund

**Munis Org Name/Number:** 2560122

**Munis Object Name/Number:** 510400

**Budget Officer / Designee:** Andy Hopkins **Date:** 05/08/2025

**Budget Officer Comment/Exceptions:** \_\_\_\_\_

**PROCUREMENT METHOD:**

**The procurement method used was** NMSA 1978, Section 13-1-111, RFP

On February 18, 2025, RFP #25096 was issued through Tyler Munis Vendor Self Service procurement portal with a receipt date of March 14, 2025. The Youth and Family Services Division received one (1) proposal for data consultation services.

Services will begin on July 1, 2025, all contracts will be for four years ending June 30, 2029.

**Chief Procurement Officer (CPO) / Designee:**  **Date:** 05/09/2025

**CPO Comment/Exceptions:** \_\_\_\_\_

**ASSOCIATED APPROVALS:**

**IT 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:**

Procurement document: RFP

Vendor's Quote (Note: proposals and Evaluation Committee Reports shall only be emailed (by CPD) to the committee directly, not included in this packet.)

Certificate of Liability Insurance (COI) (add City as an additional insured, project specifics, contact person, and primary project location)

Professional Services Contract

CITY OF SANTA FE  
PROFESSIONAL SERVICES CONTRACT

THIS CONTRACT is made and entered into by and between the City of Santa Fe, New Mexico, hereinafter referred to as the “City,” and **Aspen Solutions LLC**, hereinafter referred to as the “Contractor,” and is effective as of the date set forth below upon which it is executed by the Parties.

**RECITALS**

**WHEREAS**, the Chief Procurement Officer of the City has made the determination that this Agreement is in accordance with the provisions of the New Mexico Procurement Code (NMSA 1978, 13-1-28 et seq.) pursuant to NMSA 1978, section 13-1-111; and

**WHEREAS**, the Contractor is one of such requisite and qualifications and is willing to engage with the City for professional services, in accordance with the terms and conditions hereinafter set out, and the Contractor understanding and consenting to the foregoing is willing to render such professional services as outlined in the Agreement; and

The City and the Contractor hereby agree as follows:

**1. Scope of Work**

The Contractor shall provide the following services for the City:

1. Meet with Human Services Committee (“HSC”) and Children and Youth Commission (“CYC”) grant funded organizations to identify and plan how data collection, tracking, and reporting will occur as part of the grantee’s contract requirements.
2. Provide training and ongoing support to HSC and CYC grant funded organizations with inputting data and submitting biannual reporting for their funded program, as well as other grantee identified needs.
3. Review biannual report submissions and compile information into a presentation and overview document to be shared with commissioners and committee members. Information should highlight grantee quantitative and qualitative data, outcomes, and challenges.
4. Participate in and provide updates to the HSC and CYC on grantees in biannual reports.
5. Assist the HSC and CYC with development of data collection priorities using local, state, or regional data as part of the annual strategic planning process.
6. Work with grantees to develop target outcomes using the Results Based Accountability framework which are in line with CYC and HSC’s Key Indicators.
7. Assist nonprofit grantees in the identification of evidence based or best practice programs suitable for serving local target populations and producing outcomes of interest to the HSC or CYC.
8. Attend meetings with City staff and community stakeholders.
9. Participate in the City’s identified closed loop referral platform meetings to discuss and review network standards, data collection and inputting data into the closed loop referral platform.
10. Provide feedback on CONNECT navigation protocols and network standards.

11. Create and compile survey results administered to navigators about CONNECT to support quality improvement/evaluation initiatives.
12. Create and compile survey results administered to grantees for HSC and CYC insight related to quality improvement, evaluation or other initiatives.

## 2. Standard of Performance; Licenses

A. The Contractor does hereby accept its designation as a professional service, rendering services related to data consultation for the City, as set forth in this Agreement. The Contractor represents that Contractor possesses the personnel, experience, and knowledge necessary to perform the services described under this Contract.

B. The Contractor agrees to obtain and maintain throughout the term of this Contract, all applicable professional and business licenses required by law, for itself, its employees, agents, representatives, and subcontractors.

## 3. Compensation

A. The City shall pay to the Contractor in full payment for services satisfactorily performed based upon the Scope of Work and Deliverables listed above, such compensation not to exceed \$100,000.00 annually, including gross receipts tax. **The total amount payable to the Contractor under this Agreement, including gross receipts tax and expenses, shall not exceed \$400,000.00.**

B. Payment. The total compensation under this Agreement shall not exceed **\$400,000.00**, including New Mexico gross receipts tax. **PLEASE NOTE NO PROPERTY TAX WILL BE PAID TO THE CONTRACTOR BY THE City. 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 upon Acceptance of each Deliverable and upon the receipt and Acceptance of a detailed, certified Payment Invoice. 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. **Notice of Extended Payment Provision For Grant Funded Contracts.** This contract allows the owner to make payment within 45 days after submission of an undisputed request for payment.

## 4. Term

THIS CONTRACT SHALL NOT BECOME EFFECTIVE UNTIL APPROVED BY THE CITY. This Contract shall terminate **four (4) years from date of final signature** unless terminated pursuant to paragraph 5 (Termination) and paragraph 6 (Appropriations).

## **5. Termination**

A. Grounds. The City may terminate this Agreement for convenience or cause. For contracts within their authority, the City Manager or their designee is authorized to provide the notice of termination, otherwise such notice of termination shall be provided by the Mayor or their designee as authorized by the Governing Body. 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) 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 6, "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; 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.*

## **6. Appropriations**

The terms of this Contract are contingent upon sufficient appropriations and authorization being made by the Governing Body for the performance of this Contract. If sufficient appropriations and authorization are not made by the Governing Body, this Contract shall terminate immediately 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 Contract to unilaterally reduce funding, the Contractor shall have the option to terminate the Contract or to agree to the reduced funding, within thirty (30) days of receipt of the proposed amendment.

## **7. Status of Contractor**

The Contractor and its agents and employees are independent contractors performing professional services for the City and are not employees of the City. The Contractor and its 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 Contract. The Contractor acknowledges that all sums received hereunder are reportable by the Contractor for tax purposes, including without limitation, self-employment and business income tax. 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.

**8. Assignment**

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

**9. Subcontracting**

The Contractor shall not subcontract any portion of the services to be performed under this Contract without the prior written approval of the City. No such subcontract shall relieve the primary Contractor from its obligations and liabilities under this Contract, nor shall any subcontract obligate direct payment from the City.

**10. Release**

Final payment of the amounts due under this Contract shall operate as a release of the City, its officers and employees from all liabilities, claims and obligations whatsoever arising from or under this Contract.

**11. Confidentiality**

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

**12. Product of Service -- Copyright**

All materials developed or acquired by the Contractor under this Contract shall become the property of the City and shall be delivered to the City no later than the termination date of this Contract. Nothing developed or produced, in whole or in part, by the Contractor under this Contract shall be the subject of an application for copyright or other claim of ownership by or on behalf of the Contractor.

**13. Conflict of Interest; Governmental Conduct Act**

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

B. The Contractor further represents and warrants that it has complied with, and, during the term of this Contract, will continue to comply with, and that this Contract 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 Article are material representations of fact upon which the City relied when this Contract was entered into by the parties. Contractor shall provide immediate written notice to the City if, at any time during the term of this Contract, Contractor learns that Contractor's representations and warranties in Paragraphs A and B of this Article were erroneous on the effective date of this Contract 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 Article were erroneous on the effective date of this Contract 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 Contract to the contrary, the City may immediately terminate the Contract.

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

#### **14. 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 Contract 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 Contract, pursuant to the termination provisions as set forth in Article 4 herein, or to agree to the reduced funding.

#### **15. Entire Agreement.**

This Agreement, together with any other documents incorporated herein by reference and all related Exhibits and Schedules constitutes the sole and entire agreement of the Parties with respect to the subject matter of this Agreement, and supersedes all prior and contemporaneous understandings, agreements, representations, and warranties, both written and oral, with respect to the subject matter. In the event of any inconsistency between the statements in the body of this Agreement, and the related Exhibits and Schedules, the statements in the body of this Agreement shall control.

#### **16. Merger**

This Contract 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 contract.

All terms and conditions of **RFP # 25096 Children and Youth Commission and Human Services Committee Grantee Data Consultant** and the Contractor's response to such document(s) are incorporated herein by reference and is included in the order of precedence.

No prior Agreement or understanding, oral or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Contract.

#### **17. Penalties for violation of law**

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

#### **18. Equal Opportunity Compliance**

The Contractor agrees to abide by all federal and state laws and rules and regulations, and Santa Fe City Code, pertaining to equal employment opportunity. In accordance with all such laws of the State of New Mexico, the Contractor assures 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 Contract. If Contractor is found not to be in compliance with these requirements during the life of this Contract, Contractor agrees to take appropriate steps to correct these deficiencies.

## **19. Applicable Law**

The laws of the State of New Mexico shall govern this Contract, 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, section 38-3-2. By execution of this Contract, 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 Contract.

## **20. 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 Contract may be terminated by the City.

## **21. Professional Liability Insurance**

Contractor shall maintain professional liability insurance throughout the term of this Contract providing a minimum coverage in the amount required under the New Mexico Tort Claims Act. The Contractor shall furnish the City with proof of insurance of Contractor's compliance with the provisions of this section as a condition prior to performing services under this Contract.

## **22. Other Insurance**

If the services contemplated under this Contract will be performed on or in City facilities or property, Contractor shall maintain in force during the entire term of this Contract, 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 a 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 Contract shall be the greater of (1) the minimum coverage and limits specified in this Contract, 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 Contract are sufficient to cover the obligations of Contractor hereunder.

C. Contractor shall maintain the above insurance for the term of this Contract 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.

## **23. Records and Financial Audit**

The Contractor shall maintain detailed time and expenditure records that indicate the date; time, nature and cost of services rendered during the Contract's term and effect and retain them for a period of three (3) years from the date of final payment under this Contract. The records shall be subject to inspection by the City. The

City shall have the right to audit billings both before and after payment. Payment under this Contract shall not foreclose the right of the City to recover excessive or illegal payments.

**24. Indemnification**

The Contractor shall defend, indemnify and hold harmless the City from all actions, proceeding, claims, demands, costs, damages, attorneys’ fees and all other liabilities and expenses of any kind from any source which may arise out of the performance of this Contract, caused by the negligent act or failure to act of the Contractor, its officers, employees, servants, subcontractors or agents, or if caused by the actions of any client of the Contractor resulting in injury or damage to persons or property during the time when the Contractor or any officer, agent, employee, servant or subcontractor thereof has or is performing services pursuant to this Contract. If any action, suit or proceeding related to the services performed by the Contractor or any officer, agent, employee, servant or subcontractor under this Contract is brought against the Contractor, the Contractor shall, as soon as practicable but no later than two (2) days after it receives notice thereof, notify the legal counsel of the City.

**25. New Mexico Tort Claims Act**

Any liability incurred by the City of Santa Fe in connection with this Contract 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 Contract modifies or waives any provision of the New Mexico Tort Claims Act.

**26. Invalid Term or Condition**

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

**27. Enforcement of Contract**

A party's failure to require strict performance of any provision of this Contract 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 Contract 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.

**28. Notices**

Any notice required to be given to either party by this Contract shall be in writing and shall be delivered in person, by courier service or by U.S. mail, either first class or certified, return receipt requested, postage prepaid, as follows:

To the City: Christa Hernandez, PO Box 909 Santa Fe, NM 87504, [chernandez@santafenm.gov](mailto:chernandez@santafenm.gov)

To the Contractor: Aspen Solutions LLC, 300 Paseo de Peralta 210 Santa Fe, NM 87501, [natalie@aspensolutions.consulting](mailto:natalie@aspensolutions.consulting).

**29. Authority**

If Contractor is other than a natural person, the individual(s) signing this Contract on behalf of Contractor represents and warrants that he or she has the power and authority to bind Contractor, and that no further action, resolution, or approval from Contractor is necessary to enter a binding contract.

**30. Non-Collusion**

In signing this Agreement, the Contractor certifies the 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's Chief Procurement Officer.

**31. Default/Breach**

In case of Default and/or Breach by the Contractor, for any reason whatsoever, the City may procure the goods or services from another source and hold the Contractor responsible for any resulting excess costs and/or damages, including but not limited to, direct damages, indirect damages, consequential damages, special damages, and the City may also seek all other remedies under the terms of this Agreement and under law or equity.

**32. Equitable Remedies**

The Contractor acknowledges that its failure to comply with any provision of this Agreement will cause the City irrevocable harm and that a remedy at law for such a failure would be an inadequate remedy for the City, and the Contractor consents to the City's obtaining from a court of competent jurisdiction, specific performance, or injunction, or any other equitable relief in order to enforce such compliance. The City's rights to obtain equitable relief pursuant to this Agreement shall be in addition to, and not in lieu of, any other remedy that the City may have under applicable law, including, but not limited to, monetary damages.

**33. Default and Force Majeure**


The City reserves the right to cancel all, or any part of any orders placed under this Agreement without cost to the City, if the Contractor fails to meet the provisions of this Agreement 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 subcontractors due to any of the above, unless the City shall determine that the supplies or services to be furnished by the subcontractor 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 Clause shall not be exclusive and are in addition to any other rights now being provided by law or under this Agreement.

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

CITY OF SANTA FE:

CONTRACTOR: Aspen Solutions LLC

\_\_\_\_\_  
Alan Webber, Mayor

  
\_\_\_\_\_  
Natalie Skogerboe (Apr 23, 2025 10:56 MDT)

Natalie Skogerboe, Director

DATE: **04/23/2025**

NMBTIN#: 03-240132-00-9

ATTEST:

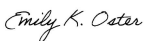
\_\_\_\_\_  
CITY CLERK

CITY ATTORNEY'S OFFICE:

  
\_\_\_\_\_  
Kyle Hibner (Apr 25, 2025 12:58 MDT)

ASSISTANT CITY ATTORNEY

APPROVED FOR FINANCES:



\_\_\_\_\_  
FINANCE DIRECTOR

**The City of Santa Fe, Central Purchasing Division  
AND  
Community Health and Safety Department**

**REQUEST FOR PROPOSALS (RFP)**

**Children and Youth Commission and Human Services Committee  
Grantee Data Consultant**



**RFP# 25096**

Proposals are due on: March 14, 2025

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**THE DATA PROJECT WILL BE BASED ON THE INDICATORS AND PRIORITIES OUTLINED BY THE CHILDREN AND YOUTH COMMISSION (HTTPS://SANTAFENM.GOV/COMMUNITY-SERVICES/CHILDREN-AND-YOUTH-COMMISSION) AND THE HUMAN SERVICES COMMITTEE (HTTPS://SANTAFENM.GOV/COMMUNITY-SERVICES/HUMAN-SERVICES-COMMITTEE)**  
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**ATTACHMENT C - CONFLICT OF INTEREST STATEMENT ..... ERROR! BOOKMARK NOT DEFINED.**

**ATTACHMENT D - NON-COLLUSION AFFIDAVIT ..... ERROR! BOOKMARK NOT DEFINED.**

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# I. INTRODUCTION

## A. PURPOSE OF THIS RFP

The purpose of this RFP is to solicit sealed proposals to establish a contract through competitive negotiations for the procurement of professional services for data consultation using a Results Based Accountability framework to support Human Services Committee and Children and Youth Commission grantees.

## B. BACKGROUND INFORMATION

The Human Services Committee was formed by Governing Body Resolution in 1987 and is charged by the City of Santa Fe Ordinance (2016) to advise and recommend health and human service policies, assess and advocate for human service needs, coordinate resources to maximize cost-effectiveness, evaluate local human service programs, provide technical assistance to programs, and make funding recommendations to the Governing Body to support nonprofit organizations that provide and maintain a safety net of services to meet the essential health and human service needs of individuals age 18 and over who reside in Santa Fe.

The Committee receives 2% of the gross receipts tax (GRT) and administers the Human Services Fund which is awarded to local nonprofits through a three-year funding cycle at approximately \$1.2 million annually. The funding amount varies due to GRT fluctuations. The Committee works in partnership with the Youth and Family Services Division staff liaison to effectively describe, plan, coordinate, sustain, and improve health and human services in Santa Fe.

In 2018, the Human Services Committee adopted the Results-Based Accountability (RBA) methodology to develop a strategic framework that identifies funding priorities and related health and social determinant indicators for community health improvement. The Human Services Committee gathered information on critical community health status and inequities identified through qualitative and quantitative data, needs assessments and information gathering.

The Results-Based Accountability Framework identifies the desired *results in mind* for the Human Services Committee's four funding priority areas:

- Adult Health
- Behavioral Health
- Community Safety
- Equitable Society

The Children and Youth Commission was formed by Governing Body Resolution 1989 and is charged by the City of Santa Fe Ordinance (1998) with surveying and assessing the needs of the children and youth within the city of Santa Fe; identifying and recommending to the governing body existing legislation, policies and programs that promote the healthy development of young people; determining priorities for program development, advocating in the community on behalf of children and youth; and planning short and long range improvements for young people, from birth through the age of twenty-one (21).

The Commission receives 3% of the City's gross receipts tax (GRT) and administers the Children and Youth Fund which is awarded to local nonprofits through a three-year funding cycle at approximately \$1.2 million annually. The funding amount varies due to GRT fluctuations. The purpose of the fund is to support community programs that promote the healthy development of children and youth, ages birth to twenty-one (21). The Commission works in partnership with the City liaison of the Youth and Family Services Division to provide advice on ways to effectively plan, coordinate and support children and youth related efforts in the Santa Fe community. Plans and policies are presented to the governing body for approval.

In 2019, to create effectiveness and efficiency in the funding and community work that comes out of the Youth and Family Services Division, the Santa Fe Regional Juvenile Justice Board successfully merged with the Children and Youth Commission. The Santa Fe Regional Juvenile Justice Board brings extensive knowledge on opportunity and juvenile justice involved youth as well as \$198,000.00 in state Children, Youth and Families Department (CYFD) Juvenile Justice Prevention funding.

The newly merged Commission strives to see positive results in the lives of community members - including improved health, improved behavioral health, improved sense of safety, and more equitable access to the kinds of opportunities that allow all constituents to achieve their full potential. The Commission is working towards affecting the overall health, safety, and quality of life of all children in Santa Fe.

In 2019, the Children and Youth Commission adopted the Results-Based Accountability (RBA) methodology to address some of the community's most urgent needs. The Commission also identified shared values, guiding principles and developed vision and mission statements.

The Results-Based Accountability Framework identifies the desired *results in mind* for the Children and Youth Commission's three funding priority areas:

- Safety and Basic Needs
- Early Childhood and Supplemental Education
- Youth Wellness

Results-Based Accountability (RBA) is a disciplined way of thinking and acting to improve entrenched and complex social problems. Communities use this methodology to improve the lives of children, youth, families and adults. RBA is used by grantees funded by the City of Santa Fe's Youth and Family Services Division to measure the impact of programs and services being provided.

RBA is the use of data-driven, decision-making processes to support communities or organizations in moving past assessing needs and towards implementing actionable steps to address identified issues within a community. One key distinction of RBA is how population and performance measures are identified and how this information then determines how impact is measured.

Results-Based Accountability (RBA) can support policymakers, funders, and program administrators to:

- Identify how well programs are doing
- Determine where programs might need to make changes
- Hold programs accountable for performance
- Identify what changes will be needed to "turn the curve"

## C. SCOPE OF PROCUREMENT

The City of Santa Fe Youth and Family Services Division is soliciting proposals from data experts, evaluators, or other professionals in the field of social work, sociology, and/or public health. The solicitation is for up to four-year contract worth up to \$100K per year in the areas of Program Evaluation, Data Collection, Analysis, and Reporting to assist nonprofit grantee organizations contracted by the Human Services Committee and Children and Youth Commission through the City of Santa Fe. The contractor will:

- train grantees on Results Based Accountability
- support grantees in identifying measurable data points which will be reported on biannually
- create grantee reporting templates which capture the information required by the City of Santa Fe's Program Manager, Human Services Committee, and Children and Youth Commission
- present summaries of the submitted mid-year and end of year reports from grantees to the Human Services Committee, and Children and Youth Commission
- support with other data consultation requests as requested by the City of Santa Fe's Program Manager, Human Services Committee, and Children and Youth Commission

The contractor will have a broad view of the needs and programs serving the Santa Fe community and specialized experience in data collection methodologies, software systems, evidence-based practices and fidelity assessments (developmental, process, outcome). The contractor will also understand the importance of ensuring confidentiality and transparency in the dissemination of information. The goal is to support grantees in measuring the impact of the programs and services they are proving.

The work includes but is not limited to;

1. Meet with grantees to conduct an analysis of current data collection, reporting, and use of Unite Us.
2. Providing training and ongoing support to grant contracted organizations with inputting data and submitting biannual reporting for their funded program, as well as other grantee identified needs;
3. Review biannual report submissions and compile information into a presentation and overview document to be shared with commissioners and committee members. Information should highlight granted quantitative and qualitative data, outcomes, and challenges.
4. As requested, participate in and provide updates to the Human Services Committee and Children and Youth Commission on grantee biannual reports.
5. As needed, assist the Human Services Committee and Children and Youth Commission with development of data collection priorities using local, state, or regional data as part of the annual strategic planning process.
6. Work with grantees to develop target outcomes using the RBA framework which are in line with Children and Youth Commission and Human Services Committee's Key Indicators.
7. As needed, assist nonprofit grantees in the identification of evidence based or best practice programs suitable for serving local target populations and producing outcomes of interest to the Committee or Commission.
8. As needed, attend meetings with City staff and community stakeholders.
9. As needed, participate in Unite Us meetings on network standards, data collection and inputting data into Unite Us.
10. Provide feedback on CONNECT navigation protocols, and network standards.
11. As requested, create and compile survey results administered to navigators about CONNECT to support with quality improvement/evaluation initiatives.

12. As requested, create and compile survey results administered to grantees for Commission or Committee insight related to quality improvement, evaluation or other initiatives.

Contractor will be reimbursed for travel and per diem expenses in accordance with the applicable U.S. General Services Administration (GSA) rates.

The resulting contract will be a single award.

This procurement will result in a contractual agreement between two parties; the procurement may ONLY be used by those two parties exclusively.

#### **D. PROCUREMENT MANAGER**

The Youth and Family Services Division has assigned a Procurement Manager who is responsible for the conduct of this procurement whose name, address, telephone number, and email address are listed below:

Name: Christa Hernandez, Procurement Manager  
Telephone: (505) 955-6728

1. **Any inquiries or requests** regarding this procurement should be submitted, in writing, to the Procurement Manager AND the Central Purchasing Division at the following emails:

Procurement Manager: [chernandez@santafenm.gov](mailto:chernandez@santafenm.gov)

Central Purchasing Division: [purchasing\\_RFP@santafenm.gov](mailto:purchasing_RFP@santafenm.gov)

Offerors may contact **ONLY** the Procurement Manager and the Central Purchasing Division regarding this procurement. Other city employees or Evaluation Committee members do not have the authority to respond on behalf of the Procurement Manager. Do not contact the Procurement Manager after the Proposals' due date.

2. **Protests of the solicitation or award must be submitted in writing to the Protest Manager.** As a Protest Manager has been named in this RFP, pursuant to NMSA 1978, Section 13-1-172 and Procurement Manual Section Y, **ONLY** protests delivered directly to the Protest Manager in writing and in a timely fashion will be considered to have been submitted properly and in accordance with statute, rule, and this RFP. Protests submitted or delivered to the Procurement Manager will **NOT** be considered properly submitted.

#### **E. PROPOSAL SUBMISSION**

***Submissions of all proposals must be accomplished via upload:***

<https://cityofsantafenmvendors.munisselfservice.com/Vendors/VBids/Default.aspx>

#### **F. DEFINITION OF TERMINOLOGY**

This section contains definitions of terms used throughout this procurement document, including appropriate abbreviations:



DEFINITION OF  
TERMINOLOGY.docx

## **G. PROCUREMENT LIBRARY**

A procurement library has been established. Offerors are encouraged to review the material contained in the Procurement Library by selecting the link provided in the electronic version of this document through your own internet connection. The library contains information listed below:

Electronic version of RFP, Questions & Answers, RFP Amendments, etc.

<https://cityofsantafenmvendors.munisselfservice.com/Vendors/VBids/Default.aspx>

Other relevant links:

<https://www.santafenm.gov/connect>

<https://uniteus.com>

<https://clearimpact.com/results-based-accountability/>

The data project will be based on the indicators and priorities outlined by the Children and Youth Commission (<https://santafenm.gov/community-services/children-and-youth-commission>) and the Human Services Committee (<https://santafenm.gov/community-services/human-services-committee>)

## II. CONDITIONS GOVERNING THE PROCUREMENT

This section of the RFP contains the schedule of events, the descriptions of each event, and the conditions governing this procurement.

### A. SEQUENCE OF EVENTS

The City’s Central Purchasing Division and the Procurement Manager will make every effort to adhere to the following schedule:

The City’s Central Purchasing Division and the Procurement Manager will make every effort to adhere to the following schedule:

Action	Responsible Party	Due Dates	Times (in Mountain)
Issue RFP	Central Purchasing Division	February 14, 2025	
Pre-Proposal Meeting	Procurement Manager /Potential Offerors	February 21, 2025	9:00 – 10:30AM
Deadline for Written Questions	Potential Offerors	February 28, 2025	No later than 5:00 PM
Response to Written Questions	Procurement Manager	March 7, 2025	
Proposals Due Date	Offerors	March 14, 2025	No later than 3:00 PM
*Interviews (If Necessary)	<i>Potential Offerors</i>	March 19, 2025	
*Identification of Potential Best-Valued Offeror(s)	Evaluation Committee	March 24, 2025	
*First Clarification Meeting	Evaluation Committee/Finalist Offeror(s)	April 8, 2025	
*Final Clarification Meeting	Evaluation Committee/Finalist Offeror(s)	April 22, 2025	
*Best and Final Offers	Offerors	April 22, 2025	
*Governing Body Approval	Governing Body	May 14, 2025	
*Contract Award(s)	Requesting Department	May 19, 2025	

\* Dates indicated in after “Proposals Due Date” through “Contract award” are estimates only and may be subject to change without necessitating an amendment to the RFP.

## B. EXPLANATION OF EVENTS

The following paragraphs describe the activities listed in the Sequence of Events , above.

The City reserves the right to:

1. Change or extend the Proposals Due Date.
2. Revise the RFP document prior to the due date.

The city will process addenda if it is determined that modifications, clarifications, or additions to the RFP are necessary. Addenda will be announced via email to registered Potential Offerors that have selected the corresponding commodity code used for this event.

### 1. Issue RFP

This RFP is being issued on behalf of The City Public Utilities Department on the date indicated in the Sequence of Events.

### 2. Pre-Proposal Meeting

A Pre-Proposal Meeting will be held as indicated in the Sequence of Events, beginning at 9:00am MST via MS Teams.

[https://teams.microsoft.com/l/meetup-join/19%3ameeting\\_MjcxZjY2YjAtY2U1Zi00MGYwLTgyZmMtNDhhZDcwY2IyMzg0%40thread.v2/0?context=%7b%22Tid%22%3a%2277b69f5a-55ed-4363-8616-4867b0bc707f%22%2c%22Oid%22%3a%2297f62189-92f2-417d-a178-e85e07d690b6%22%7d](https://teams.microsoft.com/l/meetup-join/19%3ameeting_MjcxZjY2YjAtY2U1Zi00MGYwLTgyZmMtNDhhZDcwY2IyMzg0%40thread.v2/0?context=%7b%22Tid%22%3a%2277b69f5a-55ed-4363-8616-4867b0bc707f%22%2c%22Oid%22%3a%2297f62189-92f2-417d-a178-e85e07d690b6%22%7d)

**Potential Offeror(s) are encouraged to submit written questions in advance of the conference to the Central Purchasing Division and the Procurement Manager.** The identity of the organization submitting the question(s) will not be revealed. Additional written questions may be submitted at the Meeting. All questions answered during the Pre-Proposal Meeting will be considered **unofficial** until they are posed in writing. All written questions will be addressed in writing on the date listed in the Sequence of Events. A public log will be kept of the names of potential Offeror(s) that attended the Pre-Proposal Meeting.

Attendance at this meeting is highly recommended, but not a prerequisite for submission of a proposal.

### 3. Deadline for Written Questions

Potential Offerors may submit written questions to the Central Purchasing Division and the Procurement Manager as to the intent or clarity of this RFP as indicated in the Sequence of Events. All written questions must be addressed to the Central Purchasing Division and the Procurement Manager. Questions shall be clearly labeled and shall cite the Section(s) in the RFP or other document which form the basis of the question.

### 4. Responses to Written Questions

Responses to the written questions will be provided on Bid Central, on or before the date indicated in the Sequence of Events, and is available for all potential Offerors.

An electronic version of the Questions and Answers will be posted to Bid Central.

## **5. Proposals Due Date**

ALL OFFEROR PROPOSALS MUST BE RECEIVED FOR REVIEW AND EVALUATION BY THE CENTRAL PURCHASING DIVISION.

***Proposals must be submitted electronically through the link in the Response Format and Organization section.*** Proposals submitted by facsimile will not be accepted.

Bid Central will keep a log of the names of all Offeror organizations that submit proposals. Pursuant to NMSA 1978, Section 13-1-116, the contents of proposals shall not be disclosed to competing Offerors during the negotiation process. The negotiation process is deemed to be in effect until the contract is awarded pursuant to this Request for Proposals. Awarded in this context means approved by the City's Governing Body and subsequently signed by the City Mayor.

## **6. Identification of Potential Best-Valued Offeror(s)**

All Offeror proposals will be reviewed for compliance with the requirements and specifications stated within this RFP. Proposals deemed non-responsive will be eliminated from further consideration. The Procurement Manager in conjunction with the Central Purchasing Division and the Evaluation Committee may contact the Offeror for clarification of the response. Responsive proposals will be evaluated on the factors and point values listed in this RFP. The responsible Offerors with the highest scores will be selected as finalist Offerors, based upon the proposals submitted. In accordance with NMSA 1978, 13-1-117, the responsible Offerors whose proposals are most advantageous to the City taking into consideration the Evaluation Factors in the Evaluation section will be recommended for award. Please note, however, that a serious deficiency in the response to any one factor may be grounds for rejection regardless of overall score.

## **7. First Clarification Meeting**

The City requires that the Offeror attend a First Clarification Meeting to present its proposal and to identify additional issues or concerns that the City may have. It is also an opportunity to meet all participants who may be a stakeholder in the project.

## **8. Final Clarification Meeting**

The Final Clarification Meeting is held at the end of the Clarification Phase and is used to present a summary of what was developed and agreed upon during the Clarification Phase. The final Clarification meeting is not a question-and-answer session. The Offeror and City stakeholders must not wait for the meeting to ask questions. All coordination and planning with the City should be completed prior to the Clarification Phase Summary Presentation meeting on the RFP Sequence of Events.

## **9. Best and Final Offers**

This RFP process will allow for Best and Final Offers (BAFO) from finalist Offerors. Specifically, Offerors should provide their strongest possible pricing in initial proposals, as we expect competitive submissions upfront. However, we reserve the right to re-open negotiation by requesting BAFO under the schedule outlined in Sequence of Events, or on an accelerated timeline from finalists. The purpose

would be to elicit revised pricing or other updated proposal elements that facilitate selection of the optimal offer. Finalist Offerors may also amend or clarify their proposal based on information discovered during the Clarification Meeting.

## **10. Governing Body Approval**

Depending on the amount of the total compensation, including any term extensions of the contract, either the City manager will approve and sign the contract, or it will be presented as an agenda item for the appropriate Committee Meetings and then the Governing Body for approval. The mayor signs all contracts presented to the Governing Body.

## **11. Contract Awards**

The award is subject to the CPD, Department, and City Manager/Governing Body approval. The Contractor must not commence work until the Department issues a Purchase Order.

## **12. Protest Deadline**

Any protest by an Offeror pertaining to the solicitation or award must be submitted within 15 days from the notice of solicitation or award and in conformance with NMSA 1978, Section 13-1-172 and applicable procurement regulations. As a Protest Manager has been named in this Request for Proposals, pursuant to NMSA 1978, Section 13-1-172 and Procurement Manual Section Y, ONLY protests delivered directly to the Protest Manager in writing and in a timely fashion will be considered to have been submitted properly and in accordance with statute, rule, and this Request for Proposals. The 15-calendar day protest period shall begin on the day following the notice of award of contract(s) and will end at 5:00 pm MST/MDT on the 15<sup>th</sup> day. Protests must be written and must include the name and address of the protestor and the request for proposals' number. It must also contain a statement of the grounds for protest including appropriate supporting exhibits and it must specify the ruling requested from the party listed below. The protest must be delivered to:

Travis Dutton-Leyda  
Chief Procurement Officer  
City of Santa Fe  
tkduttonleyda@santafenm.gov

**PROTESTS RECEIVED AFTER THE DEADLINE WILL NOT BE ACCEPTED.**

## **13. Finalize Contractual Agreements**

After approval of the Evaluation Committee Report, the contractual agreement resulting from this RFP will be finalized with the most advantageous Offeror, taking into consideration the evaluation factors set forth in this RFP the Sequence of Events, or as soon as possible thereafter. The most advantageous proposal may or may not have received the most points. In the event mutually agreeable terms cannot be reached with the apparent most advantageous Offeror in the timeframe specified, the City of Santa Fe reserves the right to finalize a contractual agreement with the next most advantageous Offeror without undertaking a new procurement process.

## ***C. GENERAL REQUIREMENTS***

### III. RESPONSE FORMAT AND ORGANIZATION

#### A. NUMBER OF RESPONSES

Offerors shall submit only one proposal in response to this RFP.

#### B. NUMBER OF COPIES

##### 1. ELECTRONIC SUBMISSION ONLY

**Offerors must submit proposals in response to this RFP through the Bid Central link. Only one electronic copy of each part of the proposal (Main and Cost) should be submitted, as outlined below.**

Main portion and cost portion of Offeror's proposal **must** be submitted in separate uploads as indicated below in this section and **must** be prominently identified as "Public Proposal," "Confidential Proposal," or "Cost Proposal," on the front page of each upload.

**ELECTRONIC proposal submissions must be fully submitted on:**

**<https://cityofsantafenmvendors.munisselfservice.com/Vendors/VBids/Default.aspx>** by the submission deadline in Explanation of Events. Submissions cannot be password protected and **must be in PDF format**. *The Offeror **must** ensure to allow adequate time for large PDF files (uploads/attachments) in order to fully complete the proposal response by the deadline, date and time. An electronic submission that is not both: (1) fully complete; and (2) received, via the submission link by the deadline, will be deemed late. Further, a submission that is not fully received by the deadline because the response was captured, blocked, filtered, quarantined or otherwise prevented from reaching the proper destination server by any anti-virus or other security software will be deemed late.*

#### **LATE PROPOSALS MAY NOT BE ACCEPTED**

Any proposal that does not adhere to the requirements of the **Response Format and Organization** section may be deemed non-responsive and rejected on that basis.

#### C. PROPOSAL FORMAT

All proposals must be submitted as follows:

Offerors shall include the following forms completed accurately, in the format provided and according to any instructions contained within the form. Failure to follow Offeror Form instructions may result in disqualification.

<b>Attachment</b>	<b>Form</b>	<b>Value</b>
Attachment A	Proposal Cover Page, Declaration & Checklist	Required
Attachment B	Campaign Contribution Disclosure Form	Pass/Fail
Attachment C	Conflict of Interest	Required
Attachment D	Non-Collusion Affidavit	Required
Attachment E	Key Personnel Proposal Form	Pass/Fail
Attachment F	Project Cost Proposal Form	Rated
Attachment G	Project Capability Submittal (SC/LE, VA) Checklist and Format	Pass/Fail
Attachment G1	Scope/Level of Expertise Plan (SC/LE)	Rated
Attachment G2	Value Added Plan (VA)	Rated
Attachment H	Reference List	Pass/Fail

Any proposal that does not adhere to the requirements of the **Response Format and Organization** section may be deemed non-responsive and rejected on that basis.

#### **IV. EVALUATION**

An Evaluation Committee will evaluate and score the responses to the RFP based on the information provided in each response and committee’s evaluation of the Offeror’s understanding of the objectives of this project.

The Pre-Proposal Meeting will be important for Offerors to understand what information needs to be included in their proposals.

Proposals will be reviewed based on the criteria listed below. These points have been evaluated as critical qualifications to the success of the project.

<b>No.</b>	<b>Rating Criteria</b>	<b>% Weighting</b>
1	Scope/Level of Expertise Plan (SC/LE)	35
2	Value Added Plan (VA)	5
3	Cost Proposal	35
4	Interview (If Necessary)	25
5	Local Preference	3 or 6*

\*See local preference requirements below

## A. DESCRIPTION OF EVALUATION

To ensure that a proposal is complete and addresses all key RFP issues, proposals must adhere to the following format. Proposals shall be organized into the following sections, in the order listed, and inclusive of all requested information:

- a) **Proposal Cover Page, Declaration and Checklist.** Offerors will prepare and submit the Proposal Cover Page, Declaration and Checklist (Attachment A).
- b) **Key Offeror Project Lead.** Using Attachment E, complete the Key Personnel Lead Proposal Form. The Offeror shall provide the name of the Primary Project Lead (the personnel must be the person who will be interviewed if shortlisted) that the Offeror proposes to execute the project pursuant to a resultant contract.
- c) **Project Cost Proposal Form.** The Offeror will prepare and submit a cost proposal and breakout (see Attachment F). Attachment F must be submitted in a separate electronic document from the rest of the proposal. The rest of the proposal shall not include any financial information regarding the overall project. Any financial information associated with a Value Add (Attachment G2) can be included in that section and will be seen by the Evaluation Committee.
- d) **Project Capability (PC) Submittal.** The Project Capability Submittal has two components: Scope/Level of Expertise Plan (SC/LE), and Value-Added Plan (VA). (See Attachments G, G1 and G2).
  - i. Purpose of PC Submittal
    - i. Assist City in prioritizing Offerors' submittals based on their scope, expertise, and ability to understand and deliver the intended project.
    - ii. Provide high performing Offerors the opportunity to differentiate themselves from their competitors due to their experience and expertise by using verifiable performance metrics and previous relative project performance results.
  - ii. PC Submittal Format Requirements
    - i. PC submittal must NOT contain any names that can be used to identify who the Offerors are (such as firm names, personnel names, Project names, or product names).
    - ii. A PC proposal template is included in this RFP. This document must be used by all Offerors. Offerors are NOT allowed to re-create, re-format, or modify the template in any manner. Offerors must type their responses on the Word template provided.
    - iii. Failure to comply with any of the PC format requirements may result in disqualification.
    - iv. The PC submittal shall not contain any marketing information. The submittal should be used to prove to the City that the Offeror has expertise for the specific project being proposed on.
    - v. References used in the PC submittal must be listed in the Attachment H Reference List. The Reference List is not seen by the Evaluation Committee until after PC submittal evaluations are performed.
  - iii. Overview of the Scope/Level of Expertise Plan - The Scope/Level of Expertise Plan is to allow Offerors to differentiate themselves based on their technical capability and understanding of the City's specific needs. It should summarize the metrics that show the Offeror can accomplish the

subject project with the Scope defined by past experiences on similar projects. Offerors should identify scope claims based on their expertise and experience supported by verifiable performance metrics that show the capability to this specific project environment and requirement. All cost associated with technical capabilities listed in the SC/LE plan must be included in the proposed base project cost (see Attachments F and G1).

- iv. Overview of the Value-Added Section - The purpose of the Value-Added Plan is to provide Offerors with an opportunity to identify any value-added options or ideas that may benefit the City at a change in cost or revenue. These options or ideas may also be referred to as additional or optional services. Where applicable, the Offeror should identify: 1) what the City may have excluded or omitted from its scope; and 2) how these options or ideas have been successful through verifiable performance information of previous projects. The Offeror should list the cost and time impact of its options or ideas. All cost and revenue impacts associated with these Value-Added options (Attachment G2) must NOT be included in the proposed base Cost (see Attachment F).
- v. Reference List - There will be a designated area on both the Scope/Level of Expertise Plan and Value-Added Plan where performance claims are supported by an indicated reference. As the PC submittals are anonymous, the reference will be indicated only by a reference number which corresponds to the matching number on the Reference List (Attachment H).
- vi. Interviews – The city may shortlist (if necessary) the top-rated Offerors. The shortlisted Offerors (if necessary) will be required to participate in an interview to evaluate expertise. This is not a presentation. The Evaluation Committee will interview the Key Personnel Lead on the Interview date specified in the Project Procurement Schedule. The individual is required to be in person for the interview. A second individual may be present (standby) to clarify Pricing Proposal if requested

**e) Local Preferences.**

To qualify for a local preference, an Offeror must attach a state of New Mexico Taxation and Revenue Department-issued, Resident Business certification of eligibility to its proposal, showing that the business is located within the Santa Fe municipal limits. If a proposal is received without a copy of the appropriate State of New Mexico Taxation and Revenue Department issued preference Certificate, the preference will not be applied. A valid resident business certificate is issued by the Taxation and Revenue Department pursuant to NMSA 1978, Section 13-1-22.

- a. When the City makes a purchase using a formal RFP process, not including contracts awarded on a point-based system, the City shall award an additional 3% of the total weight of all the factors used in evaluating the proposal to a local resident business. The City shall award an additional 3% of the total weight of all the factors used in evaluating the proposal to a business with all resident business subcontractors.
- b. When the City makes a purchase using a formal request for proposals' process and the contract is awarded based on a point-based system, the City shall award additional points equivalent to 3% of the total points possible to a local resident business. The City shall award an additional 3% of the total possible points to a business with all resident business subcontractors.

The maximum available local preference shall be 6% on projects funded by the city.

A. Solicitations above One Million Dollars (\$1,000,000)

- a. The City shall deem a proposal submitted by a resident business to be 6% lower than the bid submitted, if and only if at least 50% of the subcontracted services go to subcontractors who are resident businesses.
- b. The City shall deem the proposal submitted by a non-local resident business to be 3% lower than the bid submitted, if and only if at least 50% of the sub- contracted services go to subcontractors who are resident businesses.

**The Local Preferences shall not apply if the expenditure for the resulting agreement includes federal funds.**

Only one submitted preference will be applied per solicitation, not multiple. Applications are available for download at: <http://www.tax.newmexico.gov/Businesses/in-state-veteran-preference-certification.aspx>

**B. PROJECT REVENUE CONTROLS OF THE BEST VALUE APPROACH (BVA)**

There are two revenue controls in the BVA including:

- a) Best Value Check: After the prioritization of Offerors, if the best value Offeror is within 15% of the next best value cost proposal, the best value Offeror will be prioritized first. If not within the range, the best value Offeror will attempt to justify why they should be awarded the contract. If the justification is clear to the Evaluation Committee, they will move into the clarification period.
- b) Selection Check: Before the contract is awarded, an evaluation committee report must be given for the best value Offeror. If the justification is not sufficient, the award may go to the next best value who has met all the requirements of the BV approach. The Selection Check will provide the justification for hiring the highest prioritized Offeror. The Offeror selected for an award will be the one whose proposal is responsive, responsible, and is the most advantageous to the City, as determined by the City in its sole discretion.

**C. CLARIFICATION**

The potential best value Offeror will be required to complete the Clarification Phase as outlined in the Clarification Phase Guide (Attachment I). The intent of this phase is to allow the Offeror an opportunity to clarify their proposal, address any issues or risks, any concerns to be resolved, develop a Weekly Risk Report (Attachment J), and prepare a presentation for the Clarification Meeting.

**D. AWARD**

The City will notify each Offeror in writing of the City's decision.

- a) The City reserves the right to reject any or all proposals and to award more than one Offeror. The decision of the RFP award by the City is final.
- b) The City, at its sole discretion, may decide to take no procurement action as a result of the RFP and/or may re-issue all or portions of the RFP.

- c) The City reserves the right to accept or reject without consideration proposals that do not meet the full requirements of the RFP.

The final award is dependent upon the Offeror's Scope of Work (SOW) being acceptable to the City. Proposals and contents provided by the Offeror will be considered contractual obligations. Any new or unique requirements in proposals can be added or amended, at the City's sole option, and may be included in the final contract. Obligations of confidentiality will be an important condition of any resulting contractual arrangement. The selected Offeror and all employees performing duties on this project will be required to keep all aspects of this project in confidence.

All Offeror's performance will be tracked by the Department POC through the Weekly Risk Report System (See Attachment J).

## **ATTACHMENT LIST – List of all attachments included in the RFP**

Attachment A	Proposal Cover Page, Declaration & Checklist (Include as cover page in the proposal)
Attachment B	Campaign Contribution Disclosure Form
Attachment C	Conflict of Interest
Attachment D	Non-Collusion Affidavit
Attachment E	Key Personnel Lead Form
Attachment F	Project Cost Proposal Form
Attachment G	Project Capability Submittal (SC/LE, VA) Checklist and Format
Attachment G (1)	Scope / Level of Expertise Plan (SC/LE)
Attachment G (2)	Value-Added Plan (VA)
Attachment H	Reference List
Attachment I	Clarification Phase Guide
Attachment J	Weekly Risk Reporting System Guide
Attachment K	Draft Contract

# ATTACHMENT A – PROPOSAL COVER PAGE, DECLARATION, AND CHECKLIST

The Offeror must complete and submit this Attachment. This Attachment shall be the cover page for the Proposal. The following documents are required for this RFP (please mark off each document to acknowledge that you have completed and submitted the document in the proper format):

- Attachment A      Proposal Cover Page, Declaration & Checklist
- Attachment B      Campaign Contribution Disclosure Form
- Attachment C      Conflict of Interest
- Attachment D      Non-collusion Affidavit
- Attachment E      Key Personnel Lead Form
- Attachment F      Project Cost Proposal Form
- Attachment G      Project Capability Submittal (LE, RA, VA) Checklist and Format
- Attachment G (1)    Level of Expertise (LE) Plan
- Attachment G (2)    Value Added (VA) Plan
- Attachment H      Reference List

RFP # 25036

Phone Number	Company Name
Mailing Address	FEIN#
City and Country	NM BTIN#

**1. Identify the individual(s) authorized by the organization to (A) contractually obligate, (B) negotiate, and/or (C) clarify/respond to queries on behalf of this Offeror:**

	A Contractually Obligate	B Negotiate*	C Clarify/Respond to Queries*
<b>Name</b>			
<b>Title</b>			
<b>Email</b>			
<b>Telephone</b>			

\* If the individual identified in Column A also performs the functions identified in Columns B & C, then no response is required for those Columns. If separate individuals perform the functions in Columns B and/or C, they must be identified.

**2. Use of subcontractors (Select one):**

- No subcontractors will be used in the performance of any resultant contract, OR  
 The following subcontractors will be used in the performance of any resultant contract:

\_\_\_\_\_  
(Attach extra sheets, as needed)

**3. Describe any relationship with any entity (such as the City of Santa Fe, State Agency, reseller, etc. that is not a subcontractor(s) listed in #3 above), if any, which will be used in the performance of any resultant contract.**

(N/A, None, Does not apply, etc. are acceptable responses to this item.)

\_\_\_\_\_  
(Attach extra sheets, as needed)

**5. By signing the form below, the Authorized Signatory attests to the accuracy and veracity of the information provided on this form, and explicitly acknowledges the following:**

- On behalf of the submitting-organization identified above, I accept the Conditions Governing this Procurement
- I concur that submission of our proposal constitutes acceptance of the Evaluation Factors; and
- I acknowledge receipt of all amendments to this RFP, if any.

\_\_\_\_\_, 20\_\_\_\_\_  
Authorized Signature and Date (*Must be signed by the individual identified in item #1. A, above.*)

## ATTACHMENT B - CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, Sections 13-1-28, and 13-1-191.1, as amended by Laws of 2007, Chapter 234, a prospective contractor subject to this section shall disclose all campaign contributions given by the prospective contractor or a family member or representative of the prospective contractor to an applicable public official of the state or a local public body during the two years prior to the date on which a proposal is submitted or, in the case of a sole source or small purchase contract, the two years prior to the date on which the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor or a family member or representative of the prospective contractor to the public official exceeds two hundred fifty dollars (\$250) over the two-year period. A prospective contractor submitting a disclosure statement pursuant to this section who has not contributed to an applicable public official, whose family members have not contributed to an applicable public official or whose representatives have not contributed to an applicable public official shall make a statement that no contribution was made.

A prospective contractor or a family member or representative of the prospective contractor shall not give a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or during the pendency of negotiations for a sole source or small purchase contract.

Furthermore, a solicitation or proposed award for a proposed contract may be canceled pursuant to NMSA 1978, Section [13-1-181](#) or a contract that is executed may be ratified or terminated pursuant to NMSA 1978, Section [13-1-182](#) if a prospective contractor fails to submit a fully completed disclosure statement pursuant to this section; or a prospective contractor or family member or representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process.

The state agency or local public body that procures the services or items of tangible personal property shall indicate on the form the name or names of every applicable public official, if any, for which disclosure is required by a prospective contractor.

**THIS FORM MUST BE INCLUDED IN THE REQUEST FOR PROPOSALS AND MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.**

The following definitions apply:

**“Applicable public official”** means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

**“Campaign Contribution”** means a gift, subscription, loan, advance or deposit of money, or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official, or any person authorized to raise, collect, or expend contributions on that official's behalf for the purpose of electing the official to statewide or local office. “Campaign Contribution” includes the payment of a debt incurred in an election campaign but does not include the value of services provided without

compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

**“Family member”** means a spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law of (a) a prospective contractor, if the prospective contractor is a natural person; or (b) an owner of a prospective contractor;

**“Pendency of the procurement process”** means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

**“Prospective contractor”** means a person or business that is subject to the competitive sealed proposal process set forth in the Procurement Code [NMSA 1978, Sections [13-1-28](#) through [13-1-199](#)] or is not required to submit a competitive sealed proposal because that person or business qualifies for a sole source or small purchase contract.

**“Representative of a prospective contractor”** means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

**Name(s) of Applicable Public Official(s) if any:**

- Alan Webber, Mayor
- Councilor Signe I. Lindell, District 1, Pro Tem
- Councilor Alma Castro, District 1
- Councilor Carol Romero-Wirth, District 2
- Councilor Michael Garcia, District 2
- Councilor Lee Garcia, District 3
- Councilor Pilar F.H. Faulkner, District 3
- Councilor Amanda Chavez, District 4
- Councilor Jamie Cassutt, District 4

**DISCLOSURE OF CONTRIBUTIONS BY PROSPECTIVE CONTRACTOR:**

Contribution Made By: \_\_\_\_\_

Relation to Prospective Contractor: \_\_\_\_\_

Date Contribution(s) Made: \_\_\_\_\_  
\_\_\_\_\_

Amount(s) of Contribution(s) \_\_\_\_\_  
\_\_\_\_\_

Nature of Contribution(s) \_\_\_\_\_  
\_\_\_\_\_

Purpose of Contribution(s) \_\_\_\_\_  
\_\_\_\_\_

(Attach extra pages if necessary)

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Title (position)

**--OR--**

**NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250) WERE MADE** to an applicable public official by me, a family member or representative.

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Title (Position)

## ATTACHMENT C - CONFLICT OF INTEREST STATEMENT

*Complete, sign and return with your proposal.*

The City of Santa Fe policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of City contracts and Purchase Orders.

The Offeror shall comply with all applicable provisions of the Governmental Conduct Act, Chapter 10, Article 16 NMSA 1978 and include a full disclosure of all potential organization conflicts of interest in the Proposal.

In addition to the Project Manager, each key personnel shall also complete the Conflict of Interest Form below certifying that the entity has read and understands the City's policy regarding conflict of interest and the CFR. Each key personnel must also certify that there is no conflict of interest with the Project. If there is a conflict with the Project, then the Project Manager needs to describe the conflict.

The Project Manager agrees that, if after award, an organizational conflict of interest is discovered, Project Manager makes an immediate and full written disclosure to the City that includes a description of the action that Project Manager has taken or proposes to take to avoid or mitigate such conflicts. If an organizational conflict of interest is determined to exist, the City may, at its discretion, cancel the contract for the Project. If the Project Manager was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to the City, the City may terminate the contract for default.

The City may disqualify an Offeror if any of its key personnel belong to more than one Submitter organization/firm.

I, \_\_\_\_\_ certify that I/We have no personal or financial interests and no present employment or activity which would be incompatible with this firm's participation in any activity related to the RFP or execution of the awarded On-Call Automation, Controls, and SCADA Engineering Services. For the duration of this firm's involvement in the Project Manager gratuity or consideration or begin a personal or financial interest in a party who is bidding and/or proposing or associated with a bidder and/or Offeror on the proposed contract.

I certify that this firm will keep all proposed contract information confidential and secure. This organization will not copy, give, or otherwise disclose such information to any other person unless the City of Santa Fe has on file a confidentiality agreement signed by the other person, and the disclosure is authorized and necessary to the proposed contract. I understand that if this firm leaves this proposed contract before it ends, this firm must keep all contract information confidential. I agree to follow any instructions provided by the City relating to the confidentiality of the proposed contract information. I fully understand that any unauthorized disclosure made by this firm may be a basis for civil or criminal

penalties. I agree to advise the City's Procurement Officer, at 505-955-6432 immediately in the event that I or another person within this organization either learn or have reason to believe that any person who has access to the proposed contract confidential information has or intends to disclose that information in violation of this agreement.

This statement must be fully completed and signed by an authorized representative.

Company Name: \_\_\_\_\_

Authorized Representative/Title: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

The above information is subject to verification by the City of Santa Fe. If the City finds a misrepresentation, the bid may be automatically disqualified from the procurement process or the contract may be canceled.

## ATTACHMENT D - NON-COLLUSION AFFIDAVIT

*Complete, Sign and Return with your proposal.*

I hereby affirm that: I am the \_\_\_\_\_ (insert title) and the duly authorized representative of \_\_\_\_\_ (insert organization's name) whose address is \_\_\_\_\_. And, that I possess the legal authority to make this affidavit on behalf of myself and the firm for which I am acting.

I affirm:

1. I am fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal.
2. Such proposal is genuine and is not a collusive or sham proposal.
3. Neither the said Offeror nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly with any Offeror, firm or person to submit a collusive or sham proposal in connection with the Contract for which the attached proposal has been submitted or to refrain from offering a proposal in connection with the Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Offeror, firm or person to fix the price or prices in the attached proposal or of any other Offeror, or to fix any overhead, profit or cost element of the proposal or the offer price of any other Offeror, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the Mayor and Council of City of Santa Fe, New Mexico or any person interested in the proposed Contract; and
4. The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Offeror or any of its agents, representatives, owners, employees, or parties in interest, including this affiant. I do solemnly declare and affirm under the penalties of perjury that the contents of this affidavit are true and correct.

Signature \_\_\_\_\_

Printed Name \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

**ATTACHMENT E – KEY PERSONNEL LEAD FORM**

**Offeror Key Personnel Lead:** \_\_\_\_\_

## ATTACHMENT F - PROJECT COST PROPOSAL FORM

**Total Cost Proposal:** \_\_\_\_\_

Provide a Total Cost to deliver the requested project, including all the requirements described in the RFP Scope of Work Overview. The Total Cost should be broken out in two separate methods:

1. A cost breakout by ten project deliverables.
2. A cost breakout by project area (Labor, Materials and Overhead)
  - a. Equipment should be included in labor

#	Deliverables	Cost
1		\$
2		\$
3		\$
4		\$
5		\$
6		\$
7		\$
8		\$
9		\$
10		\$
<b>Total Cost</b>		<b>\$</b>

#	Project Area	Cost
1	Labor (# of Man hours)	\$ (      )
2	Materials	\$
3	Overhead	\$
<b>Total Cost</b>		<b>\$</b>

Option Year 1: (07/01/2025 thru 06/30/2026) Price: \$ \_\_\_\_\_

Option Year 2: (07/01/2026 thru 06/30/2027) Price: \$ \_\_\_\_\_

Option Year 3: (07/01/2027 thru 06/30/2028) Price: \$ \_\_\_\_\_

Option Year 4: (07/01/2028 thru 06/30/2029) Price: \$ \_\_\_\_\_

## **ATTACHMENT G – PROJECT CAPABILITY SUBMITTAL CHECKLIST AND FORMAT**

The Offeror must complete and submit this checklist along with the Project Capability (PC) Submittal. This PC Submittal Checklist is not counted in the 2-page PC Submittal limit. Failing to answer or answering “No” to any of the questions below may result in disqualification.

1. Is your PC Submittal (Attachments G1, & G2) a total of 2 pages or less (1 page maximum per document)?  Yes  No
2. Do you understand that your PC Submittal will NOT contain any names, past projects, or information that may be used to identify who your firm is?  Yes  No
3. Do you understand that you must use the PC Submittal templates provided in this RFP and that you are NOT allowed to re-create the PC Submittal Templates (cannot alter font size, add colors, add pictures, etc.) or handwrite your responses?  Yes  No
4. Do you understand that the contents of PC Submittal will become part of the Contract?  Yes  No
5. Do you understand that your Proposal may be disqualified if you fail to meet any of the above requirements?  Yes  No

## ATTACHMENT G (1) – SCOPE / LEVEL OF EXPERTISE PLAN (SC/LE)

Offerors must use this template. Offerors should identify their project performance metrics for each of the requirements. They should also put a reference # for the metric that correlates with the number on the Reference list Attachment H. The Offeror can also add additional project performance metrics that they feel differentiates themselves from other Offerors. The Offeror **may not change prefilled information or exceed the 1-page limit for this section**. Do NOT include any identifying information in your Scope/Level of Expertise Plan. Information supported by an indicated reference must have a corresponding reference listed in Attachment H: Reference List.

**\*Note: the instructions above and the example (gray highlighted column) in table below may be deleted from this form.**

Requirement	City of Santa Fe	Offeror's Project Performance	Ref #
# of Data Consultation Projects	1		
# of Data Consultation Projects with a government entity	1		
# of Data Reports Compiled from Local, State and National Sources Used to Support with Strategic Action Planning	1		
# of Data Presentations Compiled from Submitted Reports and Presented to Committees or Commissions	1		
# of Service Providers Trained in RBA	35		
Average Budget (\$)	\$100K		
Average Duration (year)	4		
Customer Satisfaction	10/10		
Average Time Deviation (%)	0%		
Average Cost Deviation (%)	0%		

Additional Project Performance Criteria	Offeror's Project Performance	Ref #

## ATTACHMENT G (2) – VALUE ADDED PLAN (VA)

Offerors must use this template. The Value-Added Plan should identify any **value-added options or ideas that may benefit the City**. The value-added claims should be prioritized (identify the most important claims first). The Offeror may add Value Added Claim rows to the table template, but **do not exceed the 1-page limit for this section**. Do NOT include any identifying information in the Plan. Information supported by an indicated reference must have a corresponding reference listed in Attachment E: Reference List. Each value-added claim will provide a brief description, extra cost/delay, and impact which describes how it would affect the project in terms of cost, time and/or quality.

**\*Note: the instructions above and the example (Gray highlighted row) in table below may be deleted from this form.**

#	Value Added	Cost	Delay	Impact	Ref #
0	Additional labor to expedite work	5%	0	Increased cost by 5%	1
1					
2					
3					

## ATTACHMENT H – REFERENCE LIST

Offerors must use this template. The Reference List’s “Ref #” must correlate with the references indicated on the Scope / Level of Expertise and Value-Added Plans. All references cited must have their Point of Contact (POC) readily available if follow-up questions or verification of project information and performance is required by the City. Any References listed which are not readily available may be considered invalid in the scoring of the Scope / Level of Expertise and Value-Added Plans.

**\*Note: the instructions above and the example (Gray highlighted row) in table below may be deleted from this form.**

Ref #	Client Name	POC Name	Email	Phone	Project Cost	Duration
0	Client A	POC Name A	<a href="mailto:A@gmail.com">A@gmail.com</a>	###-###-####	\$ 1,800,000	1/1/2020 - 5/1/2020
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

# ATTACHMENT I – CLARIFICATION PHASE GUIDE

## 1. OVERVIEW

- a. The Clarification Phase is not a negotiation phase. Offerors will not be permitted to modify their cost/fee/financial rates, project durations, or project team unless the City requests changes. The Clarification Phase is started by the notification of the Prioritized highest scoring Best Value Offeror and ended by the final presentation to the City after all issues have been addressed. If the City is not satisfied during the Clarification Phase, or upon completion of the First Clarification Meeting and Clarification Summary Meetings, the City may consider another Offeror for potential award (this Offeror would also have to participate in a Clarification Phase). If the Offeror provides all required documents and meets the requirements of the city with the potential Best-Value Offeror, The City may proceed with award.
- b. The Clarification Phase is carried out prior to the signing of the contract. The City’s objective is to have the products/services maximized without any Offeror price increases, and with high customer satisfaction. At the end of the contract period, the City will evaluate the performance of the Offeror based on these factors, so it is very important that the Offeror pre-plans the project and utilizes the Weekly Risk Report to mitigate risk.
- c. It is the Offeror’s responsibility to ensure they understand the scope of their product/service offering and to clearly identify what they are delivering. It is the Offeror’s responsibility to manage and mitigate the risk of their offering. It is the City’s responsibility to ensure that it conveys any potential concerns and issues before the contract is signed.
- d. The Clarification Phase provides the Offeror with an opportunity to identify their scope with a detailed specification and a simplified list of their tasks and financial streams. The City has the right to accept or reject this proposal. The City also has the right to identify its perceived risks, concerns, and issues which it will require the Offeror to mitigate and manage. The major deliverables in the Offeror’s scope of services in the Clarification Phase include:
  - i. Proposed detailed plan from beginning to end.
  - ii. Integrated cost/time schedule that the BV Offeror will use to track cost/time deviations.
  - iii. Simplified milestone schedule that non-technical stakeholders can follow to track deviations.
  - iv. A Cost Proposal presented in two ways: milestone schedule and major areas.
  - v. If any risk is identified, the Offeror must ensure that meeting minutes identify that the Offeror has a mitigation plan for the perceived risk to their proposed plan.
  - vi. A Weekly Risk Reporting System (WRRS, Attachment J), which will track the implementation or delivery of the service. The service should never be executed without a Purchase Order (PO) and the WRR. The Offeror will be responsible for using the WRR to track the performance of the project, update the WRR, and send all stakeholders a copy of the WRR on a weekly basis. The WRR shall include updated: 1) cost and schedule status, 2) milestone schedule status, 3) project cost and time deviations, 4) risk mitigation and other performance metrics.

## 2. PRE-PLANNING AND COORDINATION

- a. Offerors may be required to provide the City with supporting documentation for any information listed in their submittals before entering the Clarification Phase.
- b. The City requires that the Offeror attend a First Clarification Meeting to present its proposal and to identify additional issues or concerns that the City may have. It is also an opportunity to meet all

participants who may be a stakeholder in the project. The Offeror is required to perform the following functions as part of, or in preparation for, this Meeting:

- i. Ensure that the City has invited all its stakeholders and participants to the meeting (including the City, sub-Offerors, designer / AE, interested parties, etc.).
  - ii. Present the scope of services (schedule, cost, deliverables, etc.).
  - iii. Identify the City's responsibilities.
  - iv. Propose the Weekly Risk Report (WRR) format.
  - v. Field questions and concerns from City stakeholders.
  - vi. Listen to concerns, issues, and comments from the City stakeholders.
  - vii. Propose a schedule to finalize the Clarification Phase and the contract documents.
- c. Once the First Clarification Meeting is held, and if the City is comfortable with the offer, the Clarification Phase begins. The Offeror may be required to complete the following:
- i. Revisit the site/buildings/campus to do any additional investigation.
  - ii. Coordinate with all parties that will be involved with the delivery of products/services.
  - iii. Resolve concerns and issues with mitigating actions. Prepare to summarize resolutions in the final Clarification Phase Summary Presentation meeting.
  - iv. Finalize the Clarification Document (contract, WRR, payment schedule, scope of work).

### **3. CLARIFICATION DOCUMENT**

The final Clarification Document will include the following:

- a. Executive Summary - high level summary of scope documents that clearly addresses what is in scope [being delivered] and what is out of scope for the project.
- b. Finalized scope documents which include details on how the tasks will be completed.
- c. Description of the end deliverable in terms of simplified metrics.
- d. Detailed scope descriptions– A specific breakout of every action required for the Offeror to perform the work. Including all activities required by the Offeror, City and stakeholders to perform the work, inclusive of a detailed schedule and milestone schedule.
- e. Weekly Risk Report format (WRR)
- f. Project financial summary.
  - i. The Offeror's Original Price Proposal.
  - ii. A list of agreed/accepted Value-Added Options (with impact to price)
  - iii. A list of agreed upon Scope Changes or Additional Work with impact to price.
  - iv. A Price Breakout and Payment Schedule.
- g. Project and emergency contact list.
- h. PowerPoint presentation that describes the scope of the project in terms of cost, time, deliverables and how the deliverables acceptance will be decided.

### **4. FINAL CLARIFICATION MEETING**

- a. The Final Clarification Meeting is held at the end of the Clarification Phase and is used to present a summary of what was developed and agreed upon during the Clarification Phase. The final Clarification meeting is not a question-and-answer session. The Offeror and City stakeholders must not wait for the meeting to ask questions. All coordination and planning with the City should be completed prior to the Clarification Phase Summary Presentation meeting on the RFP Procurement schedule.

- b. The Offeror should give a presentation, which walks the City through the entire contract period and summarizes all of the coordination and planning done during the Clarification Phase. The Offeror should bring its team and all the documents specified in the Clarification Document. The Offeror should come with documents explaining what the City is responsible for during the contract period. The Offeror must convince the City that they have minimized or mitigated all risks and will not be surprised once the service/production begins. The Clarification meeting presentation (and meeting minutes, if applicable) will become part of the contract along with the other documents from the Clarification Phase.

# ATTACHMENT J – WEEKLY RISK REPORTING SYSTEM GUIDE

## Overview

The Weekly Risk Reporting System (WRRS) is a companion to the Quality Control Plan that is created by the best value Offeror during the Clarification Phase. The report serves as a tool for the City in analyzing the performance of the Project based on risk. The WRRS does not substitute or eliminate weekly progress reports or any other traditional reporting systems (that the Offeror may do).

The purpose of the WRRS is to allow the Offeror to document and manage all risks that occur throughout a project. Risk is defined as anything that might impact the project scope, cost, and schedule. This includes risks that are caused by the Offeror (or entities subcontracted by the Offeror), and risks that are caused by the City (scope changes, unforeseen conditions, etc.). The City's Project Manager may also require the Offeror to document risks that may impact the City satisfaction.

## Submission

The weekly report is an Excel file that must be submitted every week. The report is due every week once the Contract Award is issued, until the Project is 100% complete (and final payment is made). The Excel spreadsheet will be available from the City upon request.

The completed report must be saved using the date and name of the Project given by the City (Format: YYMMDD\_Project Name; For example, HCM Project' for the week ending Friday, Oct 7, 2021, should be labeled '211007\_HCM Project'). Weekly Reports are to be emailed by Monday.

The weekly risk report consists of reporting the project performance metrics, cost, scope changes or unforeseen events that are risks to the project in terms of scope and cost deviations, or City satisfaction including any risks that could potentially develop into an issue. When a new risk is identified, it is added to the weekly risk mitigation log.

When a risk has become an issue and causes deviation to project cost, time or quality, it is added to a project deviations log, along with the following: Identification date (date the issue was identified), plan to resolve issue, resolution due date, impact to critical path or schedule (in days), and impact to final cost (in dollars).

As deviations arise that warrant attention, the Offeror should not wait to submit the weekly risk report. The Offeror must contact the City if there are any risks or potential risks identified that are or could be rated at a high level. When a risk is eliminated or the issue is resolved, the actual date of elimination or resolution must be listed.

The City will analyze the reports for accuracy and timeliness. The reports will be used in part by the City to determine the overall final performance rating of the Offeror (and its team).

## **ATTACHMENT K - DRAFT CONTRACT**

**The Contract included as a separate PDF attachment represents the contract the City intends to use to make awards. The City of Santa Fe reserves the right to modify the Contract prior to, or during, the award process, as necessary.**

## ATTACHMENT F - PROJECT COST PROPOSAL FORM

**Total Cost Proposal:**                     \$90,000                    

Provide a Total Cost to deliver the requested project, including all the requirements described in the RFP Scope of Work Overview. The Total Cost should be broken out in two separate methods:

1. A cost breakout by ten project deliverables.
2. A cost breakout by project area (Labor, Materials and Overhead)
  - a. Equipment should be included in labor

#	Deliverables	Cost
1	Meet with grantees to conduct an analysis of current data collection, reporting and use of the Unite Us platform.	\$5,000
2	Provide training and technical assistance to grant contracted organizations with data collection and monitoring and submitting biannual city reports for their funded program, as well as other grantee identified needs.	\$20,000
3	Meet with and engage City staff and community stakeholders to plan services and share updates, and participate in Navigation meetings, Unites Us meetings, and other CYC or HSC events.	\$5,000
4	Review grantee bi-annual reports and develop summary reports, presentations, and/or fact sheets for the Commissioners and committee members that highlights grantee quantitative and qualitative data, progress, outcomes, and challenges.	\$30,000
5	Participate in and provide updates and presentations on grantee performance to the Human Services Committee and Children and Youth Commission and other municipal committees as appropriate.	\$10,000
6	Assist the Human Services Committee and Children and Youth Commission with development of data priorities using local, state or regional data as part of the annual strategic planning process.	\$5,000
7	Prepare and present ends framework data presentations to highlight data priorities and emerging trends to the Human Services Committee and Children and Youth Commission and other municipal committees as appropriate.	\$2,500
8	Work with grantees and the CYC and HSC to develop target outcomes using the RBA framework which are in line with	\$5,000

	CYC and HSC's Key Indicators; and develop a uniform data collection and reporting form for RBA metrics.	
9	Create and report on survey and/or focus group results from navigators, grantees, and CONNECT stakeholders to support quality improvement and evaluation, as requested.	\$5,000
10	As needed, assist nonprofit grantees in the identification of evidence based or best practice programs suitable for serving local target populations and producing outcomes of interest to the Committee or Commission, including following navigation protocols and/or network standards.	\$2,500
<b>Total Cost</b>		<b>\$90,000</b>

#	Project Area	Cost
1	Labor (# of Man hours)	\$81,000 (810 hours)
2	Materials	\$0
3	Overhead	\$9,000
<b>Total Cost</b>		<b>\$90,000</b>

Option Year 1: (07/01/2025 thru 06/30/2026) Price: \$           \$90,000          

Option Year 2: (07/01/2026 thru 06/30/2027) Price: \$           \$90,000          

Option Year 3: (07/01/2027 thru 06/30/2028) Price: \$           \$90,000          

Option Year 4: (07/01/2028 thru 06/30/2029) Price: \$           \$90,000

## ATTACHMENT A – PROPOSAL COVER PAGE, DECLARATION, AND CHECKLIST

The Offeror must complete and submit this Attachment. This Attachment shall be the cover page for the Proposal. The following documents are required for this RFP (please mark off each document to acknowledge that you have completed and submitted the document in the proper format):

- Attachment A Proposal Cover Page, Declaration & Checklist
- Attachment B Campaign Contribution Disclosure Form
- Attachment C Conflict of Interest
- Attachment D Non-collusion Affidavit
- Attachment E Key Personnel Lead Form
- Attachment F Project Cost Proposal Form
- Attachment G Project Capability Submittal (LE, RA, VA) Checklist and Format
- Attachment G (1) Level of Expertise (LE) Plan
- Attachment G (2) Value Added (VA) Plan
- Attachment H Reference List

**RFP # 25036**

505-239-0613  
Phone Number

Aspen Solutions, LLC  
Company Name

4029 Painted Pony Circle, Santa Fe NM 87507  
Mailing Address

45-4072252  
FEIN#

City of Santa Fe, Santa Fe County  
City and Country

03-240132-00-9  
NM BTIN#

**1. Identify the individual(s) authorized by the organization to (A) contractually obligate, (B) negotiate, and/or (C) clarify/respond to queries on behalf of this Offeror:**

	<b>A Contractually Obligate</b>	<b>B Negotiate*</b>	<b>C Clarify/Respond to Queries*</b>
<b>Name</b>	Natalie Skogerboe		
<b>Title</b>	Owner & Director		
<b>Email</b>	<a href="mailto:natalie@aspensolutions.consulting">natalie@aspensolutions.consulting</a>		
<b>Telephone</b>	505-239-0613		

\* If the individual identified in Column A also performs the functions identified in Columns B & C, then no response is required for those Columns. If separate individuals perform the functions in Columns B and/or C, they must be identified.

**2. Use of subcontractors (Select one):**

No subcontractors will be used in the performance of any resultant contract, OR

The following subcontractors will be used in the performance of any resultant contract:

Ana Coghlan, PhD, will be subcontracted with Aspen Solutions to co-lead the project with Natalie Skogerboe.  
(Attach extra sheets, as needed)

**3. Describe any relationship with any entity (such as the City of Santa Fe, State Agency, reseller, etc. that is not a subcontractor(s) listed in #3 above), if any, which will be used in the performance of any resultant contract.**

(N/A, None, Does not apply, etc. are acceptable responses to this item.)

None

(Attach extra sheets, as needed)

**5. By signing the form below, the Authorized Signatory attests to the accuracy and veracity of the information provided on this form, and explicitly acknowledges the following:**

- On behalf of the submitting-organization identified above, I accept the Conditions Governing this Procurement
- I concur that submission of our proposal constitutes acceptance of the Evaluation Factors; and
- I acknowledge receipt of all amendments to this RFP, if any.



March 11, 2025

Authorized Signature and Date (*Must be signed by the individual identified in item #1. A, above.*)

## ATTACHMENT B - CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, Sections 13-1-28, and 13-1-191.1, as amended by Laws of 2007, Chapter 234, a prospective contractor subject to this section shall disclose all campaign contributions given by the prospective contractor or a family member or representative of the prospective contractor to an applicable public official of the state or a local public body during the two years prior to the date on which a proposal is submitted or, in the case of a sole source or small purchase contract, the two years prior to the date on which the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor or a family member or representative of the prospective contractor to the public official exceeds two hundred fifty dollars (\$250) over the two-year period. A prospective contractor submitting a disclosure statement pursuant to this section who has not contributed to an applicable public official, whose family members have not contributed to an applicable public official or whose representatives have not contributed to an applicable public official shall make a statement that no contribution was made.

A prospective contractor or a family member or representative of the prospective contractor shall not give a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or during the pendency of negotiations for a sole source or small purchase contract.

Furthermore, a solicitation or proposed award for a proposed contract may be canceled pursuant to NMSA 1978, Section [13-1-181](#) or a contract that is executed may be ratified or terminated pursuant to NMSA 1978, Section [13-1-182](#) if a prospective contractor fails to submit a fully completed disclosure statement pursuant to this section; or a prospective contractor or family member or representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process.

The state agency or local public body that procures the services or items of tangible personal property shall indicate on the form the name or names of every applicable public official, if any, for which disclosure is required by a prospective contractor.

THIS FORM MUST BE INCLUDED IN THE REQUEST FOR PROPOSALS AND MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.

The following definitions apply:

**“Applicable public official”** means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

**“Campaign Contribution”** means a gift, subscription, loan, advance or deposit of money, or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official, or any person authorized to raise, collect, or expend contributions on that official's behalf for the purpose of electing the official to statewide or local office. “Campaign Contribution” includes the

payment of a debt incurred in an election campaign but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

“**Family member**” means a spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law of (a) a prospective contractor, if the prospective contractor is a natural person; or (b) an owner of a prospective contractor;

“**Pendency of the procurement process**” means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

“**Prospective contractor**” means a person or business that is subject to the competitive sealed proposal process set forth in the Procurement Code [NMSA 1978, Sections [13-1-28](#) through [13-1-199](#)] or is not required to submit a competitive sealed proposal because that person or business qualifies for a sole source or small purchase contract.

“**Representative of a prospective contractor**” means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

**Name(s) of Applicable Public Official(s) if any:**

Alan Webber, Mayor  
Councilor Signe I. Lindell, District 1, Pro Tem  
Councilor Alma Castro, District 1  
Councilor Carol Romero-Wirth, District 2  
Councilor Michael Garcia, District 2  
Councilor Lee Garcia, District 3  
Councilor Pilar F.H. Faulkner, District 3  
Councilor Amanda Chavez, District 4  
Councilor Jamie Cassutt, District 4

**DISCLOSURE OF CONTRIBUTIONS BY PROSPECTIVE CONTRACTOR:**

Contribution Made By:   N/A  

Relation to Prospective Contractor:   N/A  

Date Contribution(s) Made:   N/A  

Amount(s) of Contribution(s)   N/A



## ATTACHMENT C - CONFLICT OF INTEREST STATEMENT

*Complete, sign and return with your proposal.*

The City of Santa Fe policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of City contracts and Purchase Orders.

The Offeror shall comply with all applicable provisions of the Governmental Conduct Act, Chapter 10, Article 16 NMSA 1978 and include a full disclosure of all potential organization conflicts of interest in the Proposal.

In addition to the Project Manager, each key personnel shall also complete the Conflict of Interest Form below certifying that the entity has read and understands the City's policy regarding conflict of interest and the CFR. Each key personnel must also certify that there is no conflict of interest with the Project. If there is a conflict with the Project, then the Project Manager needs to describe the conflict.

The Project Manager agrees that, if after award, an organizational conflict of interest is discovered, Project Manager makes an immediate and full written disclosure to the City that includes a description of the action that Project Manager has taken or proposes to take to avoid or mitigate such conflicts. If an organizational conflict of interest is determined to exist, the City may, at its discretion, cancel the contract for the Project. If the Project Manager was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to the City, the City may terminate the contract for default.

The City may disqualify an Offeror if any of its key personnel belong to more than one Submitter organization/firm.

I, Natalie Skogerboe certify that I/We have no personal or financial interests and no present employment or activity which would be incompatible with this firm's participation in any activity related to the RFP or execution of the awarded On-Call Automation, Controls, and SCADA Engineering Services. For the duration of this firm's involvement in the Project Manager gratuity or consideration or begin a personal or financial interest in a party who is bidding and/or proposing or associated with a bidder and/or Offeror on the proposed contract.

I certify that this firm will keep all proposed contract information confidential and secure. This organization will not copy, give, or otherwise disclose such information to any other person unless the City of Santa Fe has on file a confidentiality agreement signed by the other person, and the disclosure is authorized and necessary to the proposed contract. I understand that if this firm leaves this proposed contract before it ends, this firm must keep all contract information confidential. I agree to follow any instructions provided by the City relating to the confidentiality of the proposed contract information. I

fully understand that any unauthorized disclosure made by this firm may be a basis for civil or criminal penalties. I agree to advise the City's Procurement Officer, at 505-955-6432 immediately in the event that I or another person within this organization either learn or have reason to believe that any person who has access to the proposed contract confidential information has or intends to disclose that information in violation of this agreement.

This statement must be fully completed and signed by an authorized representative.

Company Name: Aspen Solutions

Authorized Representative/Title: Natalie Skogerboe

Phone Number: 505-239-0613

Fax Number: \_\_\_\_\_

Email Address: natalie@aspensolutions.consulting

Signature:  \_\_\_\_\_

Date: March 11, 2025

The above information is subject to verification by the City of Santa Fe. If the City finds a misrepresentation, the bid may be automatically disqualified from the procurement process or the contract may be canceled.

## ATTACHMENT D - NON-COLLUSION AFFIDAVIT

*Complete, Sign and Return with your proposal.*

I hereby affirm that: I am the Owner & Director (insert title) and the duly authorized representative of Aspen Solutions (insert organization's name) whose address is 4029 Painted Pony Circle, Santa Fe, NM 87507. And, that I possess the legal authority to make this affidavit on behalf of myself and the firm for which I am acting.

I affirm:

1. I am fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal.
2. Such proposal is genuine and is not a collusive or sham proposal.
3. Neither the said Offeror nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly with any Offeror, firm or person to submit a collusive or sham proposal in connection with the Contract for which the attached proposal has been submitted or to refrain from offering a proposal in connection with the Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Offeror, firm or person to fix the price or prices in the attached proposal or of any other Offeror, or to fix any overhead, profit or cost element of the proposal or the offer price of any other Offeror, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the Mayor and Council of City of Santa Fe, New Mexico or any person interested in the proposed Contract; and
4. The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Offeror or any of its agents, representatives, owners, employees, or parties in interest, including this affiant. I do solemnly declare and affirm under the penalties of perjury that the contents of this affidavit are true and correct.

Signature 

Printed Name Natalie Skogerboe

Title Owner & Director

Date March 11, 2025

**ATTACHMENT E – KEY PERSONNEL LEAD FORM**

**Offeror Key Personnel Lead:** Natalie Skogerboe, Owner & Director

## **ATTACHMENT G – PROJECT CAPABILITY SUBMITTAL CHECKLIST AND FORMAT**

The Offeror must complete and submit this checklist along with the Project Capability (PC) Submittal. This PC Submittal Checklist is not counted in the 2-page PC Submittal limit. Failing to answer or answering “No” to any of the questions below may result in disqualification.

1. Is your PC Submittal (Attachments G1, & G2) a total of 2 pages or less (1 page maximum per document)?  Yes  No
2. Do you understand that your PC Submittal will NOT contain any names, past projects, or information that may be used to identify who your firm is?  Yes  No
3. Do you understand that you must use the PC Submittal templates provided in this RFP and that you are NOT allowed to re-create the PC Submittal Templates (cannot alter font size, add colors, add pictures, etc.) or handwrite your responses?  Yes  No
4. Do you understand that the contents of PC Submittal will become part of the Contract?  Yes  No
5. Do you understand that your Proposal may be disqualified if you fail to meet any of the above requirements?  Yes  No

## ATTACHMENT G (1) – SCOPE / LEVEL OF EXPERTISE PLAN (SC/LE)

Offerors must use this template. Offerors should identify their project performance metrics for each of the requirements. They should also put a reference # for the metric that correlates with the number on the Reference list Attachment H. The Offeror can also add additional project performance metrics that they feel differentiates themselves from other Offerors. The Offeror **may not change prefilled information or exceed the 1-page limit for this section**. Do NOT include any identifying information in your Scope/Level of Expertise Plan. Information supported by an indicated reference must have a corresponding reference listed in Attachment H: Reference List.

**\*Note: the instructions above and the example (gray highlighted column) in table below may be deleted from this form.**

Requirement	City of Santa Fe	Offeror's Project Performance	Ref #
# of Data Consultation Projects	1	47	1-31
# of Data Consultation Projects with a government entity	1	28	2,3,5,6,7,10,12,13,15,16,19,20,21,22,23,24,26,27,28,29,30
# of Data Reports Compiled from Local, State and National Sources Used to Support with Strategic Action Planning	1	690	1-13, 15-31
# of Data Presentations Compiled from Submitted Reports and Presented to Committees or Commissions	1	582	1-16, 18-29, 31
# of Service Providers Trained in RBA	35	61	1,5,14
Average Budget (\$)	\$100K	\$145,000	1-31
Average Duration (year)	4	3.4	1-31
Customer Satisfaction	10/10	9.9/10 Overall Satisfaction 9.75/10 Net Promoter Score	5
Average Time Deviation (%)	0%	0%	1-31
Average Cost Deviation (%)	0%	0%	1-31

Additional Project Performance Criteria	Offeror's Project Performance	Ref #
Additional Studies: In-depth studies and presentations on special populations, emerging trends, and program outcomes (case studies, focus groups, special reports).	6	4,5,8,9,10,22

## ATTACHMENT G (2) – VALUE ADDED PLAN (VA)

Offerors must use this template. The Value-Added Plan should identify any **value-added options or ideas that may benefit the City**. The value-added claims should be prioritized (identify the most important claims first). The Offeror may add Value Added Claim rows to the table template, but **do not exceed the 1-page limit for this section**. Do NOT include any identifying information in the Plan. Information supported by an indicated reference must have a corresponding reference listed in Attachment E: Reference List. Each value-added claim will provide a brief description, extra cost/delay, and impact which describes how it would affect the project in terms of cost, time and/or quality.

**\*Note: the instructions above and the example (Gray highlighted row) in table below may be deleted from this form.**

#	Value Added	Cost	Delay	Impact	Ref #
1	<b>Expert Presentations:</b> Provide expertise on emerging trends, progress, outcomes, and/or evidence-based practices with other City committees, the broader Unite Us networks, and other external partners.	5%	0	Increase cost by 5%	1,2,4,11,12, 15,20,29
2	<b>Electronic Data Management System:</b> Employ an online data management tool (such as SmartSheets) to house information and reports, generate data dashboards, report submissions, and provide resources.	20%	0	Increase cost by 20%	26
3	<b>Logic Model Development:</b> Facilitate logic model/theory of change trainings and individualized technical assistance and measurement plan development for grantees who elect to participate.	2.5%	0	Increase cost by 2.5%	2,7,13,14,15, 16,19,29

## ATTACHMENT H – REFERENCE LIST

Offerors must use this template. The Reference List’s “Ref #” must correlate with the references indicated on the Scope / Level of Expertise and Value-Added Plans. All references cited must have their Point of Contact (POC) readily available if follow-up questions or verification of project information and performance is required by the City. Any References listed which are not readily available may be considered invalid in the scoring of the Scope / Level of Expertise and Value-Added Plans.

**\*Note: the instructions above and the example (Gray highlighted row) in table below may be deleted from this form.**

Ref #	Client Name	POC Name	Email	Phone	Project Cost	Duration
0	Client A	POC Name A	<a href="mailto:A@gmail.com">A@gmail.com</a>	###-###-####	\$ 1,800,000	1/1/2020 - 5/1/2020
1	Anchorum	Loe Marcoline	lmarcoline@anchorum.org	505-310-9559	\$20,000	2/1/2021-6/30/2022
2	Carlsbad Coalition	Joana Wells	coalition.wells@gmail.com	575-256-0565	\$736,000	7/1/2017-present
3	CYFD	Carlos Romero	<a href="mailto:c.romero@apexeval.org">c.romero@apexeval.org</a>	505-828-0082	\$120,000	1/1/2015-12/30/2016
4	CHRISTUS St. Vincent	Kathleen Tunney	Kathleen.Tunney@stvin.org	717-332-5547	\$32,000	9/1/208-5/30/2019, 9/1/2022-5/30/2023, 9/1/2024-2/28/2025
5	City of Santa Fe – Youth and Family Services	Christa Hernandez	chernandez@santafenm.gov	505-955-6728	\$784,000	7/1/2017-present
6	City of Santa Fe – Fire Dept	Nicole Ault	<a href="mailto:nlault@santafenm.gov">nlault@santafenm.gov</a>	505-469-5297	\$90,000	10/1/2017-10/31/2020
7	City of Santa Fe – Violence Prevention Program	Julie Sanchez	jjsanchez@santafenm.gov	505-955-6678	\$60,000	3/1/2023-6/30/2024
8	Communities in Schools	Michelle Katz	<a href="mailto:mkatz@cisnm.org">mkatz@cisnm.org</a>	216-409-4882	\$18,000	2/1/2024-6/30/2024
9	Cooking with Kids	Anna Farrier	afarrier@cookingwithkids.org	505-438-0098	\$2,000	7/1/2022-12/30/2022
10	Coop Consulting	Michael Coop	<a href="mailto:coopconsulting@gmail.com">coopconsulting@gmail.com</a>	505-603-2024	\$30,000	7/1/2019-12/30/2019

11	Dream Tree Project	Catherine Hummel	<a href="mailto:catherine@dreamtreeproject.org">catherine@dreamtreeproject.org</a>	575-224-2382	\$75,000	12/1/23-present
12	Grant County Juvenile Justice Board	Ruth Dirmeyer	<a href="mailto:rdirmeyer@silvercitynm.gov">rdirmeyer@silvercitynm.gov</a>	575-313-7539	\$5,000	3/1/2023-8/30/2023
13	Hands Across Cultures	Diego Lopez	<a href="mailto:handsacrossculturescorp@gmail.com">handsacrossculturescorp@gmail.com</a>	505-507-4904	\$90,000	10/1/2023-present
14	Kamama Consulting	Paula Feathers	<a href="mailto:preventionworkforce@gmail.com">preventionworkforce@gmail.com</a>	505-750-8623	\$3,000	7/1/2017-12/30/2017
15	La Casa Community Behavioral Health	Kim Rutley	<a href="mailto:Krutley@lacasahealth.com">Krutley@lacasahealth.com</a>	505-977-0858	\$225,000	9/1/2017-present
16	National Latino Behavioral Health Association	Fred Sandoval	<a href="mailto:admin@nlbha.org">admin@nlbha.org</a>	505-980-5156	\$42,500	9/1/2023-11/15/2024
17	New Mexico Food Policy Council	Pam Roy	<a href="mailto:pam@farmtotable.org">pam@farmtotable.org</a>		\$5,000	9/1/2018-9/30/2019
18	Not Forgotten Farm	Mat Whitener	<a href="mailto:mat@notforgottenoutreach.org">mat@notforgottenoutreach.org</a>	520-664-5864	\$60,000	5/1/2024-present
19	Office of Substance Abuse Prevention	Pamela Espinoza or Michael Coop	<a href="mailto:pamela.espinoza@hca.nm.gov">pamela.espinoza@hca.nm.gov</a> or <a href="mailto:coopconsulting@gmail.com">coopconsulting@gmail.com</a>	505-476-9253 for PE Or 505-603-2024 for MC	\$960,000	9/1/2006-12/30/2015
20	Perpetual Tears Memorial Inc.	Adrian Ortiz	<a href="mailto:adrian.ortizptmi@gmail.com">adrian.ortizptmi@gmail.com</a>	505-288-9208	\$184,000	7/1/2017-present
21	Santa Fe County – DWI	LeAnne Rodriguez	<a href="mailto:lrodriguez@santafecountynm.gov">lrodriguez@santafecountynm.gov</a>	505-310-2910	\$152,000	1/11/2024-present
22	Santa Fe County – HHS	Jennifer Romero	<a href="mailto:jnromero@santafecountynm.gov">jnromero@santafecountynm.gov</a>	(505) 995-9526	\$5,000	1/30/2023-6/30/2023
23	Santa Fe County – LEAD	Coy Maienza	<a href="mailto:cmaienza@santafecountynm.gov">cmaienza@santafecountynm.gov</a>	505-992-9842	\$120,000	6/1/2021-present
24	Santa Fe - County Teen Court	Chanelle Delgado	<a href="mailto:cdelgado@santafecountynm.gov">cdelgado@santafecountynm.gov</a>	505-992-9875	\$22,000	1/1/2025-present
25	Socorro County Juvenile Justice Board	Kirstin Keller	<a href="mailto:kirstin.keller@hotmail.com">kirstin.keller@hotmail.com</a>	575-517-0310	\$9,000	1/1/2018-present

26	Socorro County Options, Prevention, and Education	Samantha Winter	<a href="mailto:coordinator@scopehealthcouncil.org">coordinator@scopehealthcouncil.org</a>	865-964-6440	\$212,500	10/1/2021-present
27	Socorro County Prevention Coalition	Chris Rottman	<a href="mailto:crottmanpc@gmail.com">crottmanpc@gmail.com</a>	575-317-1583	\$120,000	7/1/2017-6/30/2023
28	Southwest Indian Polytechnic Institute	Jolene Aguilar	<a href="mailto:jolene.aguilar@bie.edu">jolene.aguilar@bie.edu</a>	505-252-5037	\$63,000	9/1/2018-7/30/2021
29	Taos Pueblo	Ezra Bayles	<a href="mailto:ebayles@taospueblo.com">ebayles@taospueblo.com</a>	575-779-7925	\$100,000	12/1/2020-present
30	Torrance County DWI	Ruth Abigail	<a href="mailto:rabigail@tnm.us">rabigail@tnm.us</a>	505-544-4311	\$5,000	1/1/2025-3/1/2025
31	Torrance County Juvenile Justice Board	Rebecca Armstrong	<a href="mailto:armstrongrebecca73@gmail.com">armstrongrebecca73@gmail.com</a>	505-620-6317	\$9,000	6/1/2019-12/30/2023

**Resident Business Preference**

**STATE OF NEW MEXICO**

TAXATION AND REVENUE DEPARTMENT

**RESIDENT BUSINESS CERTIFICATE**

Issued to: ASPEN SOLUTIONS LLC  
DBA: NATALIE SKOGERBOE  
NATALIE SKOGERBOE  
4029 PAINTED PONY CIR  
SANTA FE, NM 87507-8450

Expires: **24-Jul-2027**

Certificate Number:

**L0915927408**



Stephanie Sullivan Clarke  
*Cabinet Secretary*

THIS CERTIFICATE IS NOT TRANSFERABLE

**MEMORANDUM OF AGREEMENT  
BETWEEN SANTA FE COUNTY AND THE CITY OF SANTA FE  
REGARDING "CONNECT", AN ACCOUNTABLE HEALTH COMMUNITY**

THIS MEMORANDUM OF AGREEMENT is entered into on this 10th day of November, 2020, by and between the CITY OF SANTA FE, a municipal corporation ("CITY"), and SANTA FE COUNTY, a political subdivision of the state of New Mexico ("COUNTY").

**RECITALS**

**WHEREAS**, the City of Santa Fe and Santa Fe County Community Services Departments share a common vision of connecting all residents of the City and County, especially the most in need, with the resources key to improving health and wellbeing; and

**WHEREAS**, a quality health and wellbeing system promotes a healthy community by improving the health of populations, improving the patient system of care, and reducing the per capita cost of health care, and no single government or non-government entity is accountable for achieving a healthy community;<sup>1</sup> and

**WHEREAS**, the City and Santa Fe County are dedicated to achieving a healthy community by promoting an Accountable Health Community model, which is a structured, cross-sectoral alliance of healthcare, public health, social services and other organizations that plan and implement strategies to improve population health and health equity for all its residents; and

**WHEREAS**, the model is designed to strategically leverage resources across sectors, presenting opportunities to improve population health, reduce costs, and enhance access to and quality of care;<sup>2</sup> and

**WHEREAS**, the City and the County define population health as the health outcomes of all people in Santa Fe County and recognize that population health outcomes are the product of multiple *determinants* of health, including policies, clinical and public health care, genetics, behaviors (e.g., smoking, diet, and treatment adherence), social factors (e.g., housing, employment, education, and poverty), environmental factors (e.g., occupational, food, and water safety), and the distribution of disparities in the population;<sup>3</sup> and

**WHEREAS**, the City and the County's governing bodies endorse the Accountable Health Community model and seek to improve health, improve behavioral health, improve safety, and promote more equitable access to opportunities for realizing the full potential of all people in Santa Fe County; and

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<sup>1</sup> Institute for Healthcare Improvement, Triple Aim: <http://www.ihf.org/Engage/Initiatives/TripleAim/Pages/default.aspx>

<sup>2</sup> Prevention Institute, Accountable Communities for Health: <https://www.preventioninstitute.org/projects/accountable-communities-health-ach>

<sup>3</sup> Association of State and Territorial Health Organizations: <https://www.astho.org/Health-Systems-Transformation/Medicaid-and-Public-Health-Partnerships/Learning-Series/Public-Health-and-Population-Health-101/>

**WHEREAS**, the City's Community Services Department provides and coordinates services with Santa Fe County's Community Services Department, and both coordinate with state and other partners to address the determinants of health in order to promote a healthy community; and

**WHEREAS**, the County's and the City's Community Services Departments have both embarked on creating a single network of providers connected by "navigators", professionals who screen for social needs which impact health and wellbeing including access to housing, food, transportation, utilities, and interpersonal safety and who work to connect clients with needed resources; and

**WHEREAS**, a key feature of creating this network of better-connected health and human services providers in the community is to connect residents with needed resources; and

**WHEREAS**, there exists a need for a common tool whereby aggregate data on those residents screened and navigated through the health and human services system and the activities of those agencies serving them can be tracked to establish the scope of social needs and impact of services rendered to mitigate those needs; and

**WHEREAS**, the City of Santa Fe Community Services Department, via its Human Services Committee, Children and Youth Commission, and other City of Santa Fe funding boards, contracts with many of the same providers with which Santa Fe County contracts in order to provide both safety net and navigation services; and

**WHEREAS**, both departments seek to create a better-connected network of health and human service providers in Santa Fe so that residents can access resources such as housing, food, transportation, utilities, interpersonal safety, education, childcare and employment; and

**WHEREAS**, both departments envision the network they create in Santa Fe County growing throughout the state and acting as a model for other communities in New Mexico seeking to improve the health and wellbeing of their residents; and

**WHEREAS**, the City and Santa Fe County desire to formalize an agreement to effect a coordinated network of health and human services providers providing "navigation" to residents of the City and County, the purpose of which is to help residents access resources related to health care, housing, food, transportation, utilities, interpersonal safety, and other social determinants of health to be known as "Connect"; and

**WHEREAS**, the City and County desire to name this network "Connect".

**NOW, THEREFORE, IT IS AGREED BETWEEN THE PARTIES:**

**1. PURPOSE.** The City of Santa Fe Community Services Department and the Santa Fe County Community Services Department (collectively the "Departments") agree to jointly create and support Connect, the network of health and human services providers who collectively serve the most vulnerable people in the City and County with a goal of enacting a model of care coordination that may be supported by state, federal, and private funders and replicated statewide.

2. **SCOPE.** The Departments agree to coordinate on: 1) collecting data via the same tool, a software system to assess the aggregate number of residents served by internal programs and community partner grantees and the impact of navigation and referrals on health outcomes, as well as which social needs go unmet in the County; 2) a communication strategy about Connect for the navigator network, funded agencies, current and potential partners, and the public; 3) strategies for growing the network and developing state and other funding sources for Connect.

3. **TERM.** This Memorandum of Agreement (“Agreement”) shall remain in effect until terminated by either party pursuant to Article 4 below.

4. **TERMINATION.** This Agreement may be terminated by either of the parties hereto upon written notice delivered to the other party at least 30 days prior to the intended date of termination. By such termination, neither party may nullify obligations already incurred for performance or failure to perform prior to the date of termination.

5. **LIABILITY.** Each party shall be solely responsible for fiscal or other sanctions occasioned as a result of its own violation of requirements applicable to the performance of this Agreement.

6. **NEW MEXICO TORT CLAIMS ACT.** Any liability incurred by the City or the County 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 the County and their “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.

7. **THIRD PARTY BENEFICIARIES.** By entering into this Agreement, the parties do not intend to create any right, title or interest in or for the benefit of any person other than the City and the County. No person shall claim any right, title or interest under this Agreement or seek to enforce this Agreement as a third party beneficiary of this Agreement.

8. **ASSIGNMENT.** Neither the City nor the County shall 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 other party.

9. **AMENDMENT.** This Agreement shall not be altered, changed, or amended except by instrument in writing.

**IN WITNESS WHEREOF,** the parties set their hands.

**CITY OF SANTA FE:**

  
\_\_\_\_\_  
ALAN M. WEBBER, MAYOR

Nov 17, 2020  
\_\_\_\_\_  
DATE

ATTEST:

*Yolanda Y. Vigil*  
YOLANDA Y. VIGIL  
CITY CLERK

11-17-2020  
DATE

GB Mtg 11/10/2020 GC  
GC

CITY ATTORNEY'S OFFICE:

*Marcos Martinez*  
Marcos Martinez | Jun 8, 2020 09:04 EDT  
SENIOR  
ASSISTANT  
CITY ATTORNEY

Jun 8, 2020  
DATE

APPROVED FOR FINANCES:

*Mary McCoy*  
MARY M. MCCOY  
FINANCE DIRECTOR

Nov 17, 2020  
DATE

SANTA FE COUNTY:

*Katherine Miller*  
Katherine Miller  
Santa Fe County Manager

5-28-2020  
Date

Approved as to form:

Roberta D. Joe for G.S.S.  
Gregory S. Shaffer  
Santa Fe County Attorney

May 26, 2020  
Date

Finance Department:

*Yvonne S. Herrera*  
Yvonne S. Herrera  
Finance Director

5/27/2020  
Date

**ACTION SHEET**  
**ITEM FROM FINANCE COMMITTEE MEETING OF 11/02/20**  
**FOR CITY COUNCIL MEETING OF 11/10/20**

d) Request for the Approval of a Memorandum of Agreement with Santa Fe County for coordinating health and human service provider navigation services through the CONNECT network. (Kyra Ochoa, Director, Community Services Department, [krochoa@santafenm.gov](mailto:krochoa@santafenm.gov), 955-6603)

<b>Committee</b>		<b>Review:</b>
Finance	Committee:	11/02/20
Quality of Life	Committee:	11/04/20
Governing Body: 11/10/20		

**FINANCE COMMITTEE ACTION:**  
 Approved on Consent

**FUNDING SOURCE:**

**SPECIAL CONDITIONS OR AMENDMENTS**

VOTE	FOR	AGAINST	ABSTAIN
COUNCILOR ROMERO-WIRTH	x		
COUNCILOR CASSUTT-SANCHEZ	x		
COUNCILOR LINDELL	x		
COUNCILOR VILLARREAL	x		
CHAIRPERSON ABEYTA	x		

**ACTION SHEET**  
**ITEM FROM QUALITY OF LIFE COMMITTEE MEETING OF 11/04/2020**  
**FOR CITY COUNCIL MEETING OF 11/10/2020**

**ISSUE:**

Request for the Approval of a Memorandum of Agreement with Santa Fe County for coordinating health and human service provider navigation services through the CONNECT network. (Kyra Ochoa, Director, Community Services Department, [krochoa@santafenm.gov](mailto:krochoa@santafenm.gov), 955-6603)

**Committee Review:**

Finance Committee: 11/02/20  
 Quality of Life Committee: 11/04/20  
 Governing Body: 11/10/20

**QUALITY OF LIFE COMMITTEE ACTION:** approved on consent

**SPECIAL CONDITIONS OR AMENDMENTS:**

**SEND TO:**

Governing Body

<b>VOTE</b>	<b>FOR</b>	<b>AGAINST</b>	<b>ABSTAIN</b>
CHAIRPERSON ROMERO-WIRTH	X		
COUNCILOR VILLARREAL	X		
COUNCILOR RIVERA	X		
COUNCILOR GARCIA	X		
COUNCILOR CASSUTT-SANCHEZ	X		



# City of Santa Fe, New Mexico

## Memorandum



**DATE:** August 24, 2020

**TO:** Alan Webber, Mayor

**VIA:** Jarel LaPan Hill, City Manager  
Mary McCoy, Finance Director  
Fran Dunaway, Chief Procurement Officer

**FROM:** Kyra Ochoa, Community Services Director

---

### **ITEM AND ISSUE:**

Request for the Approval of a Memorandum of Agreement with Santa Fe County for coordinating health and human service provider navigation services through the CONNECT network. (Kyra Ochoa, Director, Community Services Department, [krochoa@santafenm.gov](mailto:krochoa@santafenm.gov), 955-6603)

### **BACKGROUND AND SUMMARY:**

CONNECT is a network of navigators at clinics, community organizations, and city and county programs, which shares a vision that all Santa Fe City and County residents regardless of income have access to high quality health care and are linked to the resources they need for health and well-being. Navigators are community health workers, volunteers, or social workers who link people to services and resources in our community. Agencies in the network are connected through a shared technology platform enabling navigators to send and receive secure electronic referrals, address residents' social needs, and improve individual and community health.

Non-medical needs such as secure housing, utilities, reliable transportation, nutritious food, and safe physical and social environments are key to health and well-being. CONNECT works with partners by breaking down communication and funding silos and fostering relationships between health and social service providers as well as those between residents seeking assistance and the navigators who guide them through the system. These relationships are the essence of CONNECT.

In January, 2018, the network included three Federally Qualified Health Clinics and eight nonprofit community service organizations and programs. In the following year and a half, the network grew and added an additional 14 community service organizations and had 60 navigators in all. As of July 2019, the City of Santa Fe joined the County as a partner, bringing twenty navigators from thirteen community organizations. This fall, family and youth-serving agencies funded through the Children and Youth Commission will increase the network to over 120 navigators in 70 programs at an array of agencies funded by the City and County.

Stakeholders meet regularly to define best practices and benchmarks for success in meeting social needs. All network navigators are linked by a common software platform called Unite Us, which they use to make referrals for services and goods in and out of network and which allows for on-line and in-real-time data sharing, communication and reporting.

The MOA formalizes and outlines the City County partnership going forward.

### **PROCUREMENT METHOD:**

N/A.

**CONTRACT NUMBER:**

The FY20 Munis contract number is 3202145.

**FUNDING SOURCE:**

N/A.

The funding source is:

**Fund Name/Number:** N/A.

**Munis Org Name/Number:** N/A.

**Munis Object Name/Number:** N/A.

**ACTION REQUESTED:**

Community Services respectfully requests your review and approval.



# City of Santa Fe

## Real Estate Summary of Contracts, Agreements, Amendments & Leases

### Section to be completed by department

1. Munis Contract # 3202145

Contractor: Santa Fe County

Description: **Memorandum of Agreement for coordinating health and human service provider navigation services through the CONNECT network.**

Contract  Agreement  Lease/Rent  Amendment

Term Start Date: Upon Signature Term End Date: Indefinite

Approved by Council Date: \_\_\_\_\_

### **Contract / Lease:**

Amendment # \_\_\_\_\_ to the Original Contract / Lease # \_\_\_\_\_

Increase/(Decrease) Amount \$ N/A

Extend Termination Date to: \_\_\_\_\_

Approved by Council Date: \_\_\_\_\_

### **Amendment is for:**

2. **HISTORY** of Contract, Amendments & Lease / Rent - Please Elaborate (option: attach spreadsheet if multiple amendments)

3. Procurement History: N/A

Spending on state

File Number: 2020-0160-ME-03

Purchasing Officer Review:

Sep 30, 2020

Date:

Comment & Exceptions: MOA

4. Funding Source: N/A

Alexis Lotero

File Number: 2020-0160-ME-03

Budget Officer Approval:

Org / Object: N/A

Sep 30, 2020

Date:

Comment & Exceptions: \_\_\_\_\_

Staff Contact who completed this form: Kent DeYoung Phone # 505-955-6568

Email: kddeyoung@santafenm.gov

### To be recorded by City Clerk:

Clerk # \_\_\_\_\_

Date of Execution: \_\_\_\_\_



# CITY OF SANTA FE PROCUREMENT CHECKLIST

Contractor Name: Santa Fe County

Procurement Title: Memorandum of Agreement for navigation services through the CONNECT network

Procurement Method: State Price Agreement  Cooperative  Sole Source  Other  N/A

Exempt  Request For Proposal (RFP)  Invitation To Bid (ITB)  Contract under 60K  Contract over 60K

Department Requesting Community Services Staff Name Kyra Ochoa

### Procurement Requirements:

*A procurement file shall be maintained for all contracts, regardless of the method of procurement. The procurement file shall contain the basis on which the award is made, all submitted bids, all evaluation materials, score sheets, quotations and all other documentation related to or prepared in conjunction with evaluation, negotiation, and the award process. The procurement shall contain a written determination from the Requesting Department, signed by the purchasing officer, setting forth the reasoning for the contract award decision before submitting to the Committees. .*

### REQUIRED DOCUMENTS FOR APPROVAL BY PURCHASING\*

YES	N/A	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Procurement Checklist (by Purchasing)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Memo addressed to City Manager (under 60K) Committees/City Council (over 60K)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	State Price Agreement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	RFP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Evaluation Committee Report
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ITB
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bib Tab
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quotes (3 valid current quotes)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cooperative Agreement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sole Source Request and Determination Form
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contractors Exempt Letter
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Purchasing Officers approval for exempt procurement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	BAR
<input type="checkbox"/>	<input checked="" type="checkbox"/>	FIR
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Executed Contract, Agreement or Amendment
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Current Business Registration and CRS numbers on contract or agreement
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Summary of Contracts and Agreements form
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Certificate of Insurance
<input type="checkbox"/>	<input checked="" type="checkbox"/>	All documentation presented to Committees
<input type="checkbox"/>	<input type="checkbox"/>	Other: _____

Kent DeYoung Administrative Manager 08/24/2020

Department Rep Printed Name (attesting that all information included) Title Date

Kent DeYoung, COO  
From: Dunaway (Sep 30, 2020 10:09 AM)

Purchasing Officer (attesting that all information is reviewed) Title Date

Include all other substantive documents and records of communication that pertain to the procurement and any resulting contract.

\*

**Signature:** *Geralyn Cardenas*  
Geralyn Cardenas (Nov 17, 2020 13:43 MST)

**Email:** [gfcardenas@santafenm.gov](mailto:gfcardenas@santafenm.gov)



# City of Santa Fe, New Mexico

200 Lincoln Avenue, P.O. Box 909, Santa Fe, N.M. 87504-0909

[www.santafenm.gov](http://www.santafenm.gov)

*Alan Webber, Mayor*

Councilors:

Signe I. Lindell, Mayor Pro Tem, District 1

Alma G. Castro, District 1

Michael J. Garcia, District 2

Carol Romero-Wirth, District 2

Lee Garcia, District 3

Pilar F.H. Faulkner, District 3

Jamie Cassutt, District 4

Amanda Chavez, District 4

Dear City Staff,

In accordance with State Statute and City Ordinances, this document serves as a blanket services' determination and is valid until June 30, 2025, for the types of general, professional, and construction services that are clearly one of the types pre-established and approved by the State Purchasing Agent and City CPO.

Please continue to obtain determinations for services that do not clearly and fully fit within the types listed below. For mixed or hybrid services, unclear scopes of work, and design-build projects, a specific determination will be required. In these cases, please email [purchasing\\_det@santafenm.gov](mailto:purchasing_det@santafenm.gov) to obtain the necessary CPO determinations for your procurement needs.

Should you have any questions or require clarification on a particular service, feel free to contact CPD.

## **The following are General Services:**

- Air/bus, vehicle charter/rental service
- Auctioneers
- Audio-visual equipment setup and routine maintenance for events and presentations (including projectors, microphones, and speakers)
- Banking Services (routine, transaction-based)
- Boiler testing/water treatment service
- Bookkeeping service (routine, transaction-based)
- Building alarm systems, service and repair
- Check collection service
- Clothing, textile fabrication repair service
- Commercial laundry service, dry cleaning, etc.
- Communications systems installation, servicing, and repair
- Conference and trade show coordination

**General Services (continued):**

- Debt collection service
- Delivery/courier service
- Document storage, duplication, retrieval, review, and destruction service
- Drug testing and screening (standard tests)
- Engraving service
- Equipment installation, preventive maintenance, inspection, calibration, and repair
- Equipment rental services
- Exams administration and scoring service
- Executive recruitment
- Firefighting/suppression service
- Food preparation, vending, and catering services
- Health screening, basic diagnostic (wellness, blood pressure monitoring, blood draw, etc.)
- Herbicide application service
- Household goods packing, storage, transportation service
- HVAC system maintenance service
- Information Technology Hosting (only)
- Information Technology Help Desk Services
- Information Technology Services requiring software or equipment
- Information Technology Software and Hardware Support Services
- Interpretive services: written/oral/sign language
- Inventory service
- Janitorial service, carpet cleaning, window washing
- Laboratory testing and analysis (standard tests only)
- Land clearing/debris removal service
- Landscaping—tree planting, grooming service, lawn mowing, etc. (but not landscape architects)
- Language translation service
- Linen rental service
- Marine equipment inspection, certification, and repair

**General Services (continued):**

- Medical equipment rental or repair service (wheelchairs, walkers, etc.), including measurements, adjustments, and modifications to meet patient needs
- Metal/pipe/wiring detection service
- Office furnishings installation, refurbishment, and repair service
- Package inspection and crating
- Painting service
- Paper shredding
- Parking lot sweeping/snow removal service
- Pest/weed control service
- Photographic/micrographic processing and delivery, includes aerial and ground photography (if analysis is included, then personal service)
- Printing/duplicating service
- Process serving
- Property management (rent collection, property maintenance, etc.)
- Recycling/disposal/litter pickup service
- Retreat and workshop planning, conduct, coordination, etc.
- Security/armored car services
- Shop welding/metal fabrication service
- Software as a Service
- Steam cleaning, high pressure washing, parts cleaning service
- Studio photography service (does not include portrait painting)
- Telephone interview service (conduct of survey using prescribed survey instrument)
- Towing service
- Training – when offered as a regular course by an institution (such as a college or university)
- Travel service — air, surface, water
- Vehicle inspection, lubricating, and repair services
- Videotaping and recording service
- Warehouse dry/cold storage rental service
- Weather information service

## **The following are Professional Services:**

- Accountants (certified public accountants and registered public accountants)
- Actuaries
- Analysts of processes, programs, fiscal impact, and compliance
- Appraisers
- Archeologists
- Architects
- Artwork, original (services creating the artwork)
- Audio/video media productions (design, development, and/or oversight of)
- Auditors
- Broadband
- Business process re-engineering
- Counselors
- **Consultants (including IT Consultants)**
  - Curriculum/Examination development
  - Data Backup Services
  - Data Storage and Management Services
  - Design
  - Economists
  - Engineers
  - Environmental monitoring: noise level, safety, hazardous gas detection, radiation monitoring service, etc.
  - Financial Advisors
  - Grant writing
  - Graphic designers (creative or original in nature)
  - Independent Verification and Validation
  - Information Technology Hosting when it includes Maintenance and Support
  - Information Technology Maintenance
  - Information Technology Management

**Professional Services (Continued):**

- Information Technology Programming
- Information Technology Risk Assessment
- Insurance Adjusters
- Investigators (personnel-related, etc.)
- Investment advisors and management
- Labor negotiators
- Landscape Architects
- Lawyers
- Lobbyists
- Managed Network Services
- Management and system analysts
- Management consultants
- Marketing consultants (including identifying market opportunities, conduct of marketing programs, planning, promotion, market research surveys, etc.)
- Medical arts practitioners
- Network Cybersecurity Services
- Network Installation
- Planners
- Policy Advisors
- Product Development Services
- Program/Project Managers
- Psychologists
- Public relations advisors/Publicists
- Publication development (creation of audio/video productions, brochures, pamphlets, maps, signs, posters, annual reports, etc.)
- Researchers
- Scientists (Bio/Chem/Env/Geo/Hydro/Mech, etc.)
- Speech writers
- Statisticians

**Professional Services (Continued):**

- Surveyors
- Trade developers
- Training – when it is specifically designed for an agency as opposed to established courses (such as out of the box training offered to all at a training company, university, or college)
- Web design and development

**The following are Construction Services:**

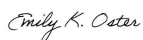
- Bid-Build (Standard)
- Construction Managers
- New Construction (including buildings, roads, bridges, utilities)
- Remodeling and Renovations (interior and exterior work)
- Demolition (including site clearance)
- Excavation and Earthwork
- Electrical Work (installation, repair, upgrades)
- Permanent installation or upgrades of audio-visual systems (including wiring and structural modifications)
- Plumbing (installation, repair, maintenance)
- Masonry and Concrete Work
- Roofing (installation, repair, maintenance)
- Structural Repair and Reinforcement
- Painting and Finishing (for construction purposes)
- Mechanical Work (HVAC systems, etc.)
- Site Preparation and Land Grading
- Utility Installation and Repair (water, sewer, gas lines)

Travis Dutton-Leyda, Chief Procurement Officer



Date: 11/21/2024

Emily Oster, Finance Director



Date: 11/26/2024








# Blanket Services Determination

Final Audit Report

2024-11-26

Created:	2024-11-21
By:	Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAAqgOwaNI_DZmo99HuXiloJc1Cdxp6T9hq

## "Blanket Services Determination" History

-  Document created by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)  
2024-11-21 - 4:11:51 PM GMT- IP address: 63.232.20.2
-  Document emailed to EMILY OSTER (ekoster@santafenm.gov) for signature  
2024-11-21 - 4:12:58 PM GMT
-  Document emailed to Travis Dutton-Leyda (tkduttonleyda@santafenm.gov) for signature  
2024-11-21 - 4:12:58 PM GMT
-  Document e-signed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)  
Signature Date: 2024-11-21 - 4:13:09 PM GMT - Time Source: server- IP address: 63.232.20.2
-  Email viewed by EMILY OSTER (ekoster@santafenm.gov)  
2024-11-26 - 7:38:13 PM GMT- IP address: 104.47.65.254
-  Document e-signed by EMILY OSTER (ekoster@santafenm.gov)  
Signature Date: 2024-11-26 - 7:52:49 PM GMT - Time Source: server- IP address: 63.232.20.2
-  Agreement completed.  
2024-11-26 - 7:52:49 PM GMT

**From:** [Matt Loehman](#)  
**To:** [HERNANDEZ, CHRISTA](#)  
**Subject:** Re: Horizons request- data consultant  
**Date:** Tuesday, December 24, 2024 9:01:28 AM

---

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Good morning,

We will respectfully decline this opportunity.

Thank you,

Matt

Matt Loehman  
Executive Director

Horizons of New Mexico  
6121 Indian School Rd. NE, Suite 220  
Albuquerque, NM 87110

office phone: (505) 345-1540  
email: [mloehman@horizonsofnewmexico.org](mailto:mloehman@horizonsofnewmexico.org)  
web: [www.horizonsofnewmexico.org](http://www.horizonsofnewmexico.org)

On Mon, Dec 23, 2024, 4:47 PM HERNANDEZ, CHRISTA <[chernandez@santafenm.gov](mailto:chernandez@santafenm.gov)> wrote:

Good Afternoon,

The City of Santa Fe, Youth and Family Services Division, is seeking quotes for a data consultant. The scope of work includes the following:

**Scope of Work:**

1. Meet with grantees to identify and plan how data collection, tracking and reporting will occur as part of the grantee contract requirements.
2. Provide training and ongoing support to HSC and CYC grant funded organizations with inputting data and submitting biannual reporting for their funded program, as well as other grantee identified needs.
3. Review biannual report submissions and compile information into a presentation and overview document to be share with commissioners and committee members. Information should highlight grantee quantitative and qualitative data, outcomes, challenges.
4. Participate in and provide updates to the Human Services Committee and Children

- and Youth Commission on grantee biannual reports.
5. Assist the Human Services Committee and Children and Youth Commission with development of data collection priorities using local, state or regional data as part of the annual strategic planning process.
  6. Work with grantees to develop target outcomes using the RBA framework which are in line with Children and Youth Commission and Human Services Committee's Key Indicators.
  7. Assist nonprofit grantees in the identification of evidence based or best practice programs suitable for serving local target populations and producing outcomes of interest to the Committee or Commission.
  8. Attend meetings with City staff and community stakeholders.
  9. Participate in Unite Us meetings on network standards, data collection and inputting data into Unite Us.
  10. Provide feedback on CONNECT navigation protocols, and network standards.
  11. Create and compile survey results administered to navigators about CONNECT to support with quality improvement/evaluation initiatives.
  12. Create and compile survey results administered to grantees for Commission or Committee insight related to quality improvement, evaluation or other initiatives.

Thank you!

Christa Hernandez

Youth and Family Services Program Manager

City of Santa Fe | Community Health and Safety Department | Youth and Family Services Division

Office: (505) 955-6728 | Cell: 505-629-3054 | Email: [chernandez@santafenm.gov](mailto:chernandez@santafenm.gov)













# Aspen Solutions Services Contract-Packet

Final Audit Report

2025-05-12

Created:	2025-05-08
By:	RACHEL GABALDON (rdgabaldon@santafenm.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAAQJJP8K6MDFGqGk-siJBRT_0clYorzI3u


## "Aspen Solutions Services Contract-Packet" History

-  Document created by RACHEL GABALDON (rdgabaldon@santafenm.gov)  
2025-05-08 - 5:13:57 PM GMT- IP address: 63.232.20.2
-  Document sent to ALEXIS LOTERO (aclotero@santafenm.gov) and ajhopkins@santafenm.gov  
ajhopkins@santafenm.gov (ajhopkins@santafenm.gov) for signature. One of them to sign  
2025-05-08 - 5:55:21 PM GMT
-  Email viewed by ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov)  
2025-05-08 - 8:24:11 PM GMT- IP address: 104.47.65.254
-  Document e-signed by ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov)  
Signature Date: 2025-05-08 - 8:26:34 PM GMT - Time Source: server- 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  
2025-05-08 - 8:26:39 PM GMT
-  Email viewed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)  
2025-05-08 - 8:37:35 PM GMT- IP address: 63.232.20.2
-  Email viewed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)  
2025-05-09 - 9:21:25 PM GMT- IP address: 63.232.20.2
-  Document e-signed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)  
Signature Date: 2025-05-09 - 10:15:23 PM GMT - Time Source: server- IP address: 63.232.20.2
-  Document emailed to EMILY OSTER (ekoster@santafenm.gov) for signature  
2025-05-09 - 10:15:27 PM GMT
-  Email viewed by EMILY OSTER (ekoster@santafenm.gov)  
2025-05-12 - 4:25:33 AM GMT- IP address: 104.47.65.254



 Document e-signed by EMILY OSTER (ekoster@santafenm.gov)

Signature Date: 2025-05-12 - 4:31:31 AM GMT - Time Source: server- IP address: 63.232.20.2

 Agreement completed.

2025-05-12 - 4:31:31 AM GMT