



## The Purchasing Memo

**Date:** May 14, 2026

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

**From:** Heather Lamboy, AICP, Planning and Land Use Director

**Via:** Brian Moya, Interim City Manager

Andrea Phillips, Interim Finance Director

Andy Hopkins, Budget Officer

**Subject:** Amendment #2: Increase in Contract Value for General Plan Update and Digital User Platform

**Vendor Name:** WSP USA, Inc.

**Munis Vendor Number:** 2960

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### ITEM AND ISSUE:

The Planning and Land Use Department respectfully requests your review and approval of Amendment #2 to Contract 3250006 with WSP USA, Inc. for the General Plan update and creation of a digital user platform. Amendment #2 includes the following: 1) changes to the Scope of Work (“SOW”); and 2) increases the total compensation by \$649,125.00 inclusive of Gross Receipts Tax (“GRT”), for a total compensation of \$2,691,220.56, inclusive of GRT.

### CONTRACT NUMBER:

The FY24 Munis contract number is 3250006.

### BACKGROUND AND SUMMARY:

On May 31, 2024, the Governing Body of the City of Santa Fe (“City”) approved a Professional Services Agreement (“Contract”) with WSP USA, Inc. for \$1,887,871.87 to update the Land Development Code (Ch. 14 of the Municipal Code) and develop a digital user platform to enhance public access to records and City information. This agreement was filed with the Clerk's office as #24-0352. At that time, the Contract was issued for the entirety of the project, based on the estimate provided in the response to the City’s RFP (#24/20/P). The contract, attached hereto as “Exhibit A,” was issued in fulfillment of the RFP. The funds for Phase 1 were appropriated in Fiscal Years 2024, 2025 and 2026, and were expended accordingly. This budget can be found in Org. 1004501 / Object Code 510300. During this time, the contract was amended by the Office of Economic Development, in partnership with the Planning and Land Use Department, to add an economic development strategic plan. This amendment increased the project budget by \$154,223.69, which resulted in a new total compensation of \$2,042,095.56 (see Amendment #1, attached as “Exhibit B”). The current request is for a second amendment, to add \$649,125.00 to the project budget in order to accommodate an accelerated schedule for the General Plan update and to expand support for the Community Partners Program, as well as addressing

some initially-unanticipated complexity related to the Assessment Report and some City-requested changes in the first three steps of the project for the General Plan as well as the content and functionality of digital user platform. WSP USA, Inc. has submitted a new proposed SOW, including budget, which is attached hereto as “Exhibit C” and is the subject of the current request. This SOW details all remaining work and deliverables, leading to project completion by December 2026. If approved, the new total compensation would be \$2,691,220.56. The contract term ends on June 30, 2028. If the current amendment is approved, the City will issue a new Purchase Order for WSP USA, Inc. under the amended Contract. The original Contract will remain active and intact, under the same contract identification number.

The revised SOW is slightly different from the original; however, it retains all the same key elements. The primary difference is the accelerated timeline; also: the methods of public engagement have been refined to better align with what worked best in Steps 1 and 2 of the process, and more of the affiliated tasks will be led by City staff as we transition to a closer working relationship with our Community Partners, since this form of involvement will become more common in future programs initiated by Land Use.

As a reminder, the General Plan update will be accomplished through the following steps:

- Step 1: Mobilization and Understanding
- Step 2: Vision and Goals
- Step 3: Scenario Planning
- Step 4: Development of Preferred Plan
- Step 5: Work Program and Funding Plan

**PRIOR APPROVALS AND SUPPORTING INFORMATION:**

**FUNDING SOURCE:**

**Fund Name/Number: General Fund/100**

**Munis Org Name/Number: Land Use 1004501**

**Munis Object Name/Number: Professional Contracts 510300**

**Budget Officer / Designee:** Andy Hopkins **Date:** 05/22/2026

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

**PROCUREMENT METHOD:**

**The procurement method used was NMSA 1978, Section 13-1-111, RFP  
RFP 24/20/P**

**Chief Procurement Officer (CPO)/Designee:** JoAnn Lovato Montano **Date:** 05/22/2026

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

**ASSOCIATED APPROVALS:**

**IT Components included?**  Yes |  No

**Approval:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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

**Treasury/Point of Sale Components included?**  Yes |  No

**Approval:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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

**Vehicles included?**  Yes |  No

**Approval:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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

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

**Approval:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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

**Is this an externally funded purchase?**  Yes |  No

**If yes, what is the issuing agency:** \_\_\_\_\_

**Approval:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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

**Is this a Capital Asset or Project?**  Yes |  No

**Project Ledger Number:** \_\_\_\_\_

**Approval:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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

**EXHIBITS:**

A: Contract # 32500060 (City of Santa Fe and WSP, USA Inc.)

B: Contract Amendment #1 (Economic Development Strategic Plan)

C: WSP USA Inc. Proposed Scope of Work and Budget (April 2026)



# CITY OF SANTA FE

**CITY OF SANTA FE**  
**AMENDMENT No. 2 TO**  
**Contract # 3250006**  
**Original City Clerk Item Number: 24-0352**  
**General Plan Update**

This AMENDMENT No. 2 the "Amendment") amends the CITY OF SANTA FE CONTRACT, dated 05/31/2024 (the "Contract"), between the City of Santa Fe (the "City") and WSP USA INC. (the "Contractor"). The date of this Amendment shall be the date when it is executed by the City and the Contractor whichever occurs last.

## **I. RECITALS**

A. Under the terms of the Contract, Contractor has agreed to provide the City with General Plan Update.

B. Pursuant to the Article 14 of the original Contract, and for good and valuable consideration, the receipt and sufficiency of which are acknowledged by the parties, the City and the Contractor agree as follows:

## **II. SCOPE OF WORK**

Article 1 of the Contract is amended to include tasks and deliverables outlined in Exhibit A, so that the following sentence is added to Article 1, and Exhibit A is considered part of the contract:

The Contractor shall facilitate a comprehensive review and revision of the City of Santa Fe's General Plan. The Contractor shall provide services included in Exhibit A of this amendment.

## **III. COMPENSATION**

Compensation - Article 3, paragraph A of the Contract is amended to increase the amount of compensation by a total of 649,125.00 so that Article 3, paragraph A reads in its entirety as follows:

1. The City shall compensate the Contractor for the goods described in the Scope of Work, based on the itemized amounts and/or rates specified in Exhibit A. The City agrees to pay the Contractor \$600,000.00, which excludes Gross Receipts Tax (GRT). The GRT applicable to this contract is levied at the rate of 8.1875%, equating to \$ 49,125.00 The total compensation amount of the original Professional Services Contract (5-31-2024 for \$1,887,871.87), the Economic Development Amendment No. 1 (12-16-2025 for \$154,223.69) and this Amendment No. 2 shall not exceed \$2,691,220.56.

**IV. NOTIFICATION**

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

|   |  |  |
|---|--|--|
| <p><b><u>To the City:</u></b><br/>         Chief Procurement Officer<br/> <a href="mailto:purchasing@santafenm.gov">purchasing@santafenm.gov</a><br/>         PO Box 909<br/>         Santa Fe, NM 87504-0909</p> | <p>Land Use Admin<br/>         Heather Lamboy<br/>         200 Lincoln Ave.<br/>         Santa Fe, NM 87505<br/> <a href="mailto:purchasing@santafenm.gov">purchasing@santafenm.gov</a><br/>         (505)470-5281</p> | <p><b><u>To the Contractor:</u></b><br/>         WSP USA INC<br/>         Nick Fazio<br/>         2440 Louisiana Blvd NE Ste 400<br/>         Albuquerque, NM 87110<br/> <a href="mailto:nick.fazio@wsp.com">nick.fazio@wsp.com</a><br/>         (505)870-4449</p> |
|---|--|--|

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

**V. CONTRACT IN FULL FORCE**

Except as specifically provided in this Amendment, the Contract remains and shall remain in full force and effect, in accordance with its terms, and with the additional terms set forth in Section II, Scope of Work, above, in this Amendment.

[SIGNATURE PAGE TO FOLLOW]

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:

\_\_\_\_\_  
MICHAEL GARCIA, MAYOR

CONTRACTOR:

*Daniel Sims*  
\_\_\_\_\_  
[Daniel Sims \(May 15, 2026 14:31:07 MDT\)](#)  
DANIEL SIMS  
SENIOR VICE PRESIDENT AND  
LOCAL BUSINESS LEADER

DATE: May 15, 2026

NMBTIN: \_\_\_\_\_

ATTEST:

\_\_\_\_\_  
GERALYN CARDENAS, CITY CLERK

Approved to form and legal sufficiency by:

*Marcos D. Martínez*  
\_\_\_\_\_  
[Marcos D. Martínez \(May 15, 2026 14:38:59 MDT\)](#)  
MARCOS D. MARTÍNEZ, CITY ATTORNEY

APPROVED FOR FINANCES:

*AP*  
\_\_\_\_\_  
[ANDREA PHILLIPS \(May 22, 2026 14:12:30 MDT\)](#)  
ANDREA PHILLIPS, INTERIM FINANCE DIRECTOR



# Exhibit A

April 20, 2026

Heather Lamboy, AICP, Director  
City of Santa Fe Planning & Land Use Department  
200 Lincoln Avenue, Box 909  
Santa Fe, NM 87505

**Re: Contract #3204702, Amendment Request: Contract & Budget Adjustment Request for Santa Fe Forward**

Dear Heather,

Thank you for the opportunity to submit this request for a contract amendment and budget increase for the City of Santa Fe General Plan Update (Contract #3204702), now known as Santa Fe Forward. The purpose of this amendment is to update and align the scope of work for Santa Fe Forward to focus on the tasks necessary to complete this project from the date hereof.

The parties acknowledge that the work completed to date, described in Exhibit 1, is subject to the original scope of work and has been completed. With respect to the scope of work detailed below and that is necessary to complete Santa Fe Forward, this amendment represents the entire remaining agreement between the parties and supersedes all prior oral and written agreements and representations between the parties.

We propose to perform and complete the work described herein through **December 31, 2026**, for a lump sum additional fee of **\$600,000**. This amount does not include New Mexico Gross Receipts Tax (NMGRT). Estimated NMGRT (8.1875%), on the entire amendment amount, is **\$49,125**, and is to be paid separately by the City of Santa Fe, per the contract. The total authorized project budget is **\$650,000 inclusive** of NMGRT. These values do not include the separate amendment and associated value for the Economic Development Strategy.

We are available to continue working immediately upon receipt of a contract amendment and purchase order, or other mutually approved written Notice to Proceed. If you have any questions during your review of our proposal, please contact me (505-870-4449; [nick.fazio@wsp.com](mailto:nick.fazio@wsp.com)) or Aron Kirsch (347-419-2191; [aron.kirsch@wsp.com](mailto:aron.kirsch@wsp.com)). On behalf of WSP USA, thank you for the opportunity to submit this amendment.

Sincerely,

Nick Fazio  
Vice President, Communications Advisory Services | WSP USA Inc.

## UNDERSTANDING

WSP, in collaboration with three specialized subconsultants, will work with the City of Santa Fe to complete the General Plan Update – also known as Santa Fe Forward – and bring it through adoption. This effort requires integrating substantial technical work already completed with remaining policy development, scenario analysis, community engagement, and plan refinement. Our team recognizes the need for a clear, coordinated, and efficient approach that maintains momentum, fills existing gaps, and delivers a final plan that reflects community priorities, aligns with City objectives, and provides a strong foundation for future decision-making.

### **Quality Assurance/Quality Control**

Consultant team, including subconsultants, will perform services consistent with the professional standard of care ordinarily exercised by consultants performing similar services. If the City reasonably determines based on specific deficiencies that a deliverable does not materially conform to the agreed scope of services or documented project requirements, Consultant will revise the deliverable at no additional cost to the City, and document the request on the project management change log. Revisions resulting from changes in scope, new direction, or additional information provided after the deliverable was prepared may require an amendment to the scope and fee.

**Human Authorship and Professional Judgment.** The Consultant assumes that all services and work products under this scope will be performed by qualified professional staff. Artificial intelligence (AI) tools may be used on a limited basis to support internal efficiency, such as organizing large volumes of public input; however, AI will not be used to independently produce project deliverables. All analysis, interpretation, recommendations, and final work products will reflect the professional judgment and authorship of human staff.

## SCHEDULE

Project delivery is anticipated to commence on or around **Monday, June 1, 2026** upon receipt of Notice to Proceed (NTP), mutually acceptable to the City, WSP and its sub-consultants. A detailed project schedule will be developed after NTP is received, but major milestones are anticipated to include adoption of the final plan in late summer/early fall 2026, development of the implementation plan with adoption in December 2026, and overall project completion by December 31, 2026. As this is an accelerated project schedule, any delays resulting from procurement or administrative approvals shall be addressed on a day-for-day basis, with all project milestones adjusted accordingly.

**Closeout Activities.** Project close-out activities, assumed to be delivery of all final files and deliverables, handover of the project website and communications, and preparation and issuance of any remaining outstanding invoices, will be fully completed with project completion. All obligations related to project close-out shall be deemed satisfied upon completion of these activities.

| Table 1:<br>Revised Work<br>Plan Steps | CY2024 |    |    |    | CY2025 |    |    |    | CY2026 |    |    |    |
|--|--------|----|----|----|--------|----|----|----|--------|----|----|----|
|  | Q1     | Q2 | Q3 | Q4 | Q1     | Q2 | Q3 | Q4 | Q1     | Q2 | Q3 | Q4 |
| Step 1                                 |        |    |    |    |        |    |    |    |        |    |    |    |
| Step 2                                 |        |    |    |    |        |    |    |    |        |    |    |    |
| Step 3                                 |        |    |    |    |        |    |    |    |        |    |    |    |
| Step 4                                 |        |    |    |    |        |    |    |    |        |    |    |    |
| Step Forward                           |        |    |    |    |        |    |    |    |        |    |    |    |
| Step Action                            |        |    |    |    |        |    |    |    |        |    |    |    |
| Step Ongoing                           |        |    |    |    |        |    |    |    |        |    |    |    |

|              |   |
|--------------|---|
| Step 1       | Mobilization and Understanding                |
| Step 2       | Mission, Vision and Goals                     |
| Step 3       | Scenario Framework Planning                   |
| Step 4       | Plan Development                              |
| Step Forward | Public Hearings/Action                        |
| Step Action  | Implementation Action Plan                    |
| Step Ongoing | Engagement, Communications and Administration |

## PROJECT MANAGEMENT

WSP will provide comprehensive project management services to support the City of Santa Fe’s General Plan Update. Our team will oversee project scheduling, budget tracking, and risk management while coordinating with City staff, elected officials, partner agencies, and community stakeholders. We will manage consultant workflows, ensure timely delivery of high-quality technical products, and maintain transparent communication through regular reporting and decision-making support. STV Inc. will participate in project management meetings and provide advisory support.

## Assumptions

- Assumes an anticipated total period of performance of approximately 45 weeks from the date of Notice to Proceed (NTP). For budgeting purposes, it is estimated that approximately 17 performance weeks will occur in Fiscal Year 2026 and 26 performance weeks in Fiscal Year 2027, assuming a spring 2026 NTP. Actual distribution of effort across fiscal years may vary depending on the final NTP date.
- Assumes approximately three (3) hours of WSP project management time per week.
- Up to 30 re-occurring project management meetings; weekly during the project ramp-up period and then moving to bi-weekly after that as needed. Assumes each meeting is one (1) hour long and requires 0.5 hours of prep and follow-up time for agenda setting. These meetings will include a standing agenda item for DUP-related tasks.
- Up to two (2) updates to existing project presentations/slide decks per fiscal year for a total of four (4) updates.
- Up to two (2) hours per month in progress reporting and invoicing for the Project Manager. All WSP Project Accountant (PA) labor hours are nonbillable and not reflected in the proposed fee.
- Includes limited number of hours of deputy project management support to provide alternative coverage and support in contracting.

- Monthly subconsultant invoices are to be included in WSP’s monthly invoicing to the City. For all services rendered in this scope of work to complete Santa Fe Forward, subconsultant invoices older than three (3) months are non-payable.
- WSP will use a change log, available on the project SharePoint, to capture and record all requested changes in scope, impact on fee, and approvals. Any exceedances must be authorized in advance by the City before the work is commenced.
- Assumes mileage for two (2) round trips between Albuquerque and Santa Fe for the Project Manager to coordinate on project management needs or other ad hoc meetings. Mileage for task-specific trips is captured in each subsequent task below, as needed.
- No overnight or out-of-state travel is included for any WSP staff.
- Principal-in-Charge will be available as a client satisfaction resource. Labor hours for the Principal-in-Charge are nonbillable and not reflected in this proposed fee.

**Deliverables**

- In-agenda meeting notes for weekly and bi-weekly project management meetings.
- Monthly invoices and project reports, delivered on the 10<sup>th</sup> of each month for the preceding month.
- One (1) project management change log
- Up to four (4) updates to project presentations.

| WSP Scope Item  | Labor Hours | Not to Exceed Price |
|---|-------------|---------------------|
| <b>Assumed Fiscal Year 2026</b>   | <b>154</b>  | <b>\$25,804.00</b>  |
| Project Management  | 62          | \$12,288.00         |
| SharePoint Management   | 6           | \$653.00            |
| Team Meetings and Coordination  | 54          | \$7,446.00          |
| Updates to Presentations  | 24          | \$3,581.00          |
| Progress Reporting and Invoicing for PM – Project Accountant time in non-billable | 8           | \$1,665.00          |
| Direct Expenses   |             | \$171.00            |
| <b>Assumed Fiscal Year 2027</b>   | <b>168</b>  | <b>\$29,561.00</b>  |
| Project Management  | 86          | \$17,285.00         |
| SharePoint Management   | 8           | \$870.00            |
| Team Meetings and Coordination  | 38          | \$5,156.00          |
| Updates to Presentations  | 24          | \$3,581.00          |
| Progress Reporting and Invoicing for PM – Project Accountant time in non-billable | 12          | \$2,498.00          |
| Direct Expenses   |             | \$171.00            |
| <b>Total WSP hours and fee for this task</b>                                      | <b>322</b>  | <b>\$55,365.00</b>  |

## COMMUNICATIONS AND PUBLIC INVOLVEMENT

WSP will deliver streamlined communications and public involvement services to ensure the City of Santa Fe's General Plan Update is clear, accessible, and community-driven. Our team will develop concise messaging, manage digital and in-person engagement, and produce user-friendly materials that translate technical content into understandable information. We will coordinate outreach across platforms, facilitate meaningful dialogue with diverse stakeholders, and provide responsive support to City staff, ensuring every phase of the process is transparent, inclusive, and aligned with community expectations. STV Inc. will provide advisory support.

### Assumptions

- Includes one (1) final open house (assumed late summer). Open house planning and implementation will be led by consultant team and be based off the implementation plan for the open house conducted in June 2025.
  - Open house advertising will not include radio ads.
  - Up to three (3) WSP staff will be in attendance. All other open house/station staffing will be provided by the City.
  - Live interpreters for Spanish or any other language will only be provided if requested by a member of the public and will be provided at direct expense to the City. Interpretation services costs are not included in this budget. Notifications for public in-person events will include information on how to request interpretation services with at least 72 hours' notice.
- Consultant participation at Governing Body councilor district roadshow meetings, hosted by City staff, are not included.
- City staff will lead in planning and implementation of any ad hoc briefings requested by community groups or other jurisdictions/agencies.
- All tabling/pop-up events will be staffed by up to two (2) junior WSP staff. The City may choose to plan and implement additional tabling/pop-up events. All tabling materials will be handed to the City at any time by request and will live with the City after completion of the project (branded tablecloth etc.) Any additional branded gifts/items will be ordered by the City and paid via a separate budget.
- No new branded swag, grab items etc. will be procured within this scope as a part of this fee.
- All coordination on public involvement and communications will occur at bi-weekly project management meetings.
- Includes one (1) round of consolidated City review for all deliverables.
- All public-facing communications materials and assets (social media, boards, fact sheet etc.) will be made available in English and Spanish. The Public Engagement and Communications Plan (PECP) will not be translated into Spanish.
- Direct compensation to Community Partners will be processed by WSP.
- No additional video assets will be prepared. Existing video assets collected and prepared can be used for one (1) final end of project capstone and thank you video.
- Open house notifications will not include any roadside banners or radio ads. Local newspaper ads will be considered.
- City staff will lead in planning and implementation of any Community Partner in-person engagement, including workshops. Consultant staff may provide limited planning and outreach support for up to up to three (3) virtual engagements. WSP will provide in-person support and

facilitation services for up to two (2) in-person engagements. Consultant support provided may include providing email communications/invitations and preparation of a workshop agenda, presentation, or other in-meeting materials. WSP will also provide a high-level summary of the engagement methods, steps, and lessons learned from working with Community Partners. City responsibilities will include general outreach and coordination to Community partners, and scheduling the venue and planning logistics for any additional in-person engagements, including facilitation for any events beyond two (2) in-person engagements facilitated by WSP, and notetaking/summarizing.

- City staff will write newsletter communications copy. Consultant team will format, prepare for review and approval, and distribute finalized digital newsletter. Up to four (4) editions total will be delivered, timed to milestones at Vision/Scenario, Draft Plan, Final Plan/Implementation, and project close.
- Two meetings with the Technical Working Group (TWG) will occur only during the Stage Gate milestone process, consolidated with Planning Commission. City staff will be responsible for coordinating and scheduling with the TWG. WSP staff can provide limited support in preparing email communications to the TWG. Foundational preparation of materials, including the TWG presentation, is assumed to be completed by Consultant within each task.
- Any unused direct expenses, including unspent Community Partner mini-grant compensation, can be directed to provide additional labor hours for this or other tasks at the request of the City.
- Assumes mileage for up to sixteen (16) round trips between Albuquerque and Santa Fe for the Project Manager or junior public involvement staff. Half of these trips (up to eight) are assumed to occur in Fiscal Year 2026 and half of these trips (up to eight) are assumed to occur in Fiscal Year 2027. This includes trips for tabling or pop-ups.
- Up to two (2) nights of overnight, out-of-state travel for Christian Lopez. Overnight, out-of-state travel is not included for any other WSP staff.

### **Deliverables**

- Up to two (2) PECP updates
- Up to four (4) substantive updates to SantaFeForward.org, reflecting input phases for vision/scenario planning, draft and final plan, and implementation; includes one quick survey per phase using embedded Social Pinpoint functions
- Up to five (5) streamlined social media packages, aligned with vision/scenario planning, draft and final plan, implementation, and adoption
- Up to four (4) simplified updates to the Community Partner Outreach Toolkit aligned with the remaining phases of work
- Planning and implementation for up to six (6) tabling/pop-up events in total
- Planning and implementation for up to two (2) in-person Community Partner engagements and communications and notification support for additional virtual engagements.
- Up to four (4) project newsletters, with draft copy provided by the City.
- One (1) draft and one (1) final updated bilingual fact sheet
- Planning and implementation for one (1) open house event (assumed mid- to late-summer), inclusive of logistics, notifications and up to eight (8) open house boards/exhibits. All printed materials will be reviewed and approved by the city before printing.
- Up to three (3) public involvement updates to Governing Body presentations aligned with public involvement outcomes from vision/scenario planning, draft and final plan, and implementation

| WSP Scope Item   | Labor Hours | Not to Exceed Price |
|--|-------------|---------------------|
| <b>Assumed Fiscal Year 2026</b>                            | <b>332</b>  | <b>\$74,046.00</b>  |
| Public Engagement Planning                                 | 42          | \$5,007.00          |
| Community Partners   | 58          | \$6,714.00          |
| Engagement Strategies                                      | 68          | \$7,893.00          |
| Templates, Website, Social Media, and Materials            | 114         | \$17,270.00         |
| Reporting  | 30          | \$3,737.00          |
| Newsletter Communications                                  | 20          | \$2,848.00          |
| Direct Expenses  |             | \$4,660.00          |
| Direct Expenses: Community Partner Mini-Grant Compensation |             | \$25,917.00         |
| <b>Assumed Fiscal Year 2027</b>                            | <b>430</b>  | <b>\$64,850.00</b>  |
| Public Engagement Planning                                 | 42          | \$5,007.00          |
| Community Partners   | 58          | \$6,714.00          |
| Equity Communications                                      | 40          | \$6,584.00          |
| Engagement Strategies                                      | 74          | \$8,346.00          |
| Templates, Website, Social Media, and Materials            | 146         | \$22,433.00         |
| Reporting  | 50          | \$6,258.00          |
| Newsletter Communications                                  | 20          | \$2,848.00          |
| Direct Expenses  |             | \$6,660.00          |
| <b>Total WSP hours and fee for this task</b>               | <b>762</b>  | <b>\$138,896.00</b> |

### DIGITAL USER PLATFORM (THE CITY SMART)

WSP will continue implementation of a modern digital user platform that serves as the central public and internal-facing hub for the Planning and Land Use Department. The platform will streamline *access* to available planning information, existing permit data, maps, and project updates while improving transparency and accessibility. Built for clarity, usability, and long-term adaptability, it will integrate intuitive navigation, mobile-friendly interfaces, and role-based features that support both staff operations and community engagement. This unified platform will enhance transparency, improve service delivery, and provide a reliable digital foundation for the department’s evolving needs. STV Inc. will provide advisory support.

#### Assumptions

- Up to ten (10) reoccurring Digital User Platform coordination meetings will be conducted. Additional Digital User Platform coordination, project delivery, and discussion on project updates will occur via email or at weekly or bi-weekly project management meetings. All Digital User Platform updates to the consultant Project Manager will be captured under the project management scope and fee.

- All additional requests to add datasets, modules, or additional functionality will be logged on the Digital User Platform request tracker and prioritized and implemented only after clear written approval from the City is received, and only if the budget allows.
- Assumes all coordination and meeting will be virtual. No mileage between Albuquerque and Santa Fe for the Project Manager, and no overnight or out-of-state travel is included for any WSP staff.
- WSP staff will lead a discussion with City and technical staff to determine storage space capacity and costs moving forward as a part of DUP implementation.
- WSP will include guidance and user guide information on general steps for future integration with OpenGov as part of the User Guide Training and Documentation deliverable. Technical integration with OpenGov can be added as a change order once more fully mapped out.
- WSP will conduct a workshop with City staff (at no cost) to determine their digital public engagement needs and vision moving forward to better understand potential platform enhancements, and prepare a digital public engagement roadmap.
- Data integrity and scanning are City responsibilities.
- WSP will provide up to 36 nonbillable (no cost) hours over three months (average of three hours per week for 12 weeks) to ensure that the DUP and SantaFeForward.org are in alignment with final approval of all deliverables by Governing Body. Assumed January through March 2027 or otherwise scheduled based on commensurate project delay.
- WSP will provide 3D axonometric vignettes within the Digital User Platform based on three (3) scenario frameworks and a limited set of existing General Plan datasets using standard 3-D visualization and spatial navigation capabilities. Vignettes will included embedded storytelling components to describe key details and relevant General Plan data and considerations.

**Deliverables and Actions**

- Ten (10) monthly Digital User Platform coordination meetings
- Launch Historical Permit Viewer
  - Historical Permitting Forms – linkage to parcel data
- Launch Open Data Portal
- Prepare the following guidance documents:
  - GIS staff to update parcel data
  - Permit document addition and update process
- Post the Updated General Plan Digital Version
- Add Updated General Plan data layers to the maps and open data portal
- Integration of up to three (3) additional plans (e.g., Bicycle Master Plan, Pedestrian Master Plan, Water Plan etc.) from NTP of this amendment
- Up to sixteen (16) hours of staff training and assistance, subject to prior authorization from the City project manager or project director, and captured on the project management change log
- One (1) comprehensive “User Guide” for City staff
- One (1) data storage and management summary memo
- One (1) two-hour digital public engagement workshop and roadmap (no cost)
- One (1) Interactive Scenario Visualization Module
- Up to 36 hours of nonbillable post adoption support for the Digital User Platform and SantaFeForward.org at no cost.

| WSP Scope Item                                       | Labor Hours | Not to Exceed Price |
|--|-------------|---------------------|
| <b>Assumed Fiscal Year 2026</b>                      | <b>128</b>  | <b>\$24,262.00</b>  |
| Digital User Platform implementation and enhancement | 128         | \$24,262.00         |
| <b>Assumed Fiscal Year 2027</b>                      | <b>108</b>  | <b>\$21,183.00</b>  |
| Digital User Platform implementation and enhancement | 108         | \$21,183.00         |
| <b>Total WSP hours and fee for this task</b>         | <b>236</b>  | <b>\$45,445.00</b>  |

**VISIONING**

**WSP**

WSP will create a Vision Summary Document that communicates the goals and direction of Santa Fe Forward. The document will serve as a high-level, visually engaging overview that is accessible, easy to understand, and reflective of the established Santa Fe Forward brand. The Vision Document will be a concise, graphics-heavy publication designed for both print and digital use. Content will be written for a general audience and presented in a clear, compelling, and visually cohesive manner. The document will align with the Santa Fe Forward brand identity and visual language and will be fully compliant with ADA accessibility standards. Graphics and maps included in the document will be illustrative in nature only and are not intended for technical, regulatory, or planning analysis.

- Design a visually engaging, brand-aligned Vision Document consistent with the Santa Fe Forward look and feel
- Translate provided content into a clear, public-facing layout that emphasizes graphics, diagrams, icons, and streamlined text
- Develop page layouts, graphic treatments, and visual hierarchy to support easy comprehension by a broad audience
- Incorporate illustrative maps, diagrams, and infographics as appropriate
- Ensure the document is compatible with both print and digital formats
- Ensure the final document meets ADA accessibility requirements, including color contrast, typography, document structure, and digital readability
- Coordinate with City staff to review content, layout, and design direction

**WSP Assumptions**

- The Vision Document will be developed from existing content and data.
- Assumes all coordination and meeting will be virtual. One (1) virtual meeting with City staff to discuss content, design direction, and overall approach.
- No mileage between Albuquerque and Santa Fe for the Project Manager, and no overnight or out-of-state travel is included for any WSP staff.
- One (1) round of review and revision based on consolidated feedback from the City.

**WSP Deliverables**

- One (1) draft and one (1) final digital Vision Document, not to exceed eight (8) pages in length (plus or minus three pages)
- The final document will be provided in a print-ready PDF format and an accessible digital PDF format suitable for online distribution

**Subconsultant – STV Inc.**

The subconsultant team will lead the development of a final clear, inspiring community Vision for the General Plan by synthesizing public input, stakeholder perspectives, and City priorities into a unified long-term direction. The Vision will help articulate the shared values, aspirations, and outcomes that will guide policy development and shape Santa Fe’s future growth.

| WSP Scope Item                        | Labor Hours | Not to Exceed Price |
|---------------------------------------|-------------|---------------------|
| Assumed Fiscal Year 2026              | 36          | \$5,999.00          |
| Final Vision, Mission, and Strategies | 36          | \$5,999.00          |

**SCENARIO PLANNING**

**WSP**

WSP will support STV Inc. and Design Workshop in completion of Final Scenario Frameworks for the Santa Fe Forward General Plan. The Final Scenario Frameworks will communicate alternative future scenarios in a clear, engaging, and highly visual manner that is accessible to the general public and reflective of the Santa Fe Forward brand. The Final Scenario Frameworks will present three (3) refined scenario concepts that illustrate different potential futures for Santa Fe. The scenarios will be conveyed through graphic-forward layouts that emphasize conceptual diagrams and illustrative exhibits rather than technical detail. The scenarios and supporting graphics will align with the Santa Fe Forward and City of Santa Fe brand identity and will be suitable for both print and digital distribution.

- Refine three (3) existing scenario concepts into clear, public-facing Final Scenario Frameworks
- Develop two (2) additional supporting exhibits
- Transform existing technical or planning-oriented materials into illustrative, conceptual graphics appropriate for public communication
- Apply the Santa Fe Forward brand and City of Santa Fe visual standards to all layouts, graphics, and exhibits
- Ensure all scenario materials are compatible with both print and digital formats
- Ensure all deliverables meet ADA accessibility requirements, including color contrast, typography, document structure, and digital readability
- Coordinate with City and subconsultant staff to review design direction, clarity, and overall presentation

**Assumptions**

- Developed from existing content and data
- One (1) meeting with City staff to discuss content, design direction, and overall approach.
- Assumes mileage for one (1) round trip between Albuquerque and Santa Fe for the Project Manager. No overnight or out-of-state travel is included for any WSP staff.
- One (1) round of review and revision based on consolidated feedback from the City. This round of review may include additional clarity on items related to already delivered drafts at no additional fee.
- Subconsultant participation at Stage Gate 2/3 is virtual. WSP Project Manager will attend in-person.

- These are diagrammatic frameworks and will not be mapped to the parcel level.
- Modeling is excluded.

**Deliverables**

- Three (3) Final Scenario Framework concept exhibits, presented in a polished, public-facing format
- Two (2) additional supporting illustrative exhibits that complement and clarify the scenarios
- Final deliverables provided in print-ready and accessible digital formats

**Subconsultant – STV Inc. and Design Workshop**

The subconsultant team will develop final scenario frameworks that illustrate multiple paths for Santa Fe’s future growth and policy choices. Using data analysis, community input, and City priorities, the team will create contrasting yet feasible scenarios that test land use, mobility, housing, environmental, and economic outcomes. These frameworks will provide a structured basis for evaluating tradeoffs, guiding discussions, and informing the selection of a preferred direction for the General Plan.

| WSP Scope Item                   | Labor Hours | Not to Exceed Price |
|----------------------------------|-------------|---------------------|
| Assumed Fiscal Year 2026         | 72          | \$11,868.00         |
| Conceptual level Final Scenarios | 72          | \$11,783.00         |
| Direct Expenses                  |             | \$85.00             |

**UPDATED GENERAL PLAN DOCUMENT**

**WSP**

The consultant team will develop a focused and streamlined Updated General Plan that is readily digestible by many audiences will be developed based on the Assessment Report, Visioning, and Scenario Planning deliverables.

The final General Plan will be delivered in two parts: an illustrative summary document and a white paper version in Microsoft Word and PDF. The illustrative summary document will provide a high-level overview and insight into each chapter of the General Plan. The illustrative summary is intended to help the general public quickly understand the structure, themes, and intent of the Plan.

Each chapter overview within the illustrative summary will link to the full chapter content, which will be formatted in Microsoft Word. The Word-formatted chapters will align visually with the Santa Fe Forward brand while remaining functional for formal adoption, review, and future updates. The final General Plan materials will be suitable for both print and digital use and will comply with ADA accessibility standards.

Development of the General Plan will be led by STV Inc. and supported by Design Workshop as described in the scope section below. WSP will complete the following scope to support the development of the General Plan:

- Lead one (1) four-hour Plan Charrette Working Session with City staff and project partners to establish technical needs and objective, design direction, visual approach, and organizational structure for the Final Plan.

- Assessment Report subject matter experts will support the development and review of policies proposed in the General Plan.
- Provide transportation data to Design Workshop for the development of the Connectivity Street Map.
- Lead QA/QC review of the administrative draft, public review draft and final General Plan document.
- Lead design and formatting:
  - Design an illustrative summary document that provides a concise, visual overview of each General Plan chapter.
  - Develop graphic-forward layouts that emphasize diagrams, icons, infographics, and illustrative elements rather than technical detail.
  - Ensure the illustrative summary clearly introduces and links to each corresponding chapter.
  - Format individual General Plan chapters in Microsoft Word, applying brand-consistent typography, styles, and visual elements.
  - Ensure consistency between the illustrative summary and chapter documents in tone, hierarchy, and visual language.
  - Apply the Santa Fe Forward and City of Santa Fe brand standards across all materials.
  - Ensure all deliverables are compatible with print and digital formats.
  - Ensure all deliverables meet ADA accessibility requirements, including document structure, color contrast, typography, and digital navigation.
  - Coordinate with City staff to review layout, design direction, and usability.

**Subconsultant – STV Inc.**

Development of the General Plan will be led by STV Inc. supported by Design Workshop. STV Inc. will complete the following scope to develop the General Plan:

- Finalize the General Plan Outline with the City of Santa Fe. A plan document outline developed in late 2025 is representative of the level of effort and volume of the final plan document.
- Lead and prepare General Plan Administrative Draft text. STV Inc. will be the primary author of the General Plan and will collaborate with consultant team subject matter experts to inform policy development.
- Direct Design Workshop in the preparation of General Plan maps.
- Collaborate with Design Workshop on the development of the Placetypes.
- Direct and co-lead stage gate milestones with TWG/Planning Commission and Governing Body.

**Subconsultant – Design Workshop**

Design Workshop will complete the following scope to develop the General Plan:

- Prepare foundational plan maps including:
  - Preferred Plan Map
  - Future Land Use Map
  - Urban Form Map
  - Connectivity Street Map with data provided by WSP.
- Collaborate with STV Inc. on the development of Placetypes.
- Prepare precedent and illustrative images.
- Assessment Report subject matter experts will support the development and review of policies

proposed in the General Plan.

### **Subconsultant –Leland Consulting Group**

Leland Consulting Group will complete the following scope to develop the General Plan:

- Assessment Report subject matter experts will support the development and review of policies proposed in the General Plan.

### **Assumptions**

- WSP technical contributors to the Assessment Report will support the development and review of policies not to exceed 84 hours and only through the WSP task lead and junior contributor.
- For the General Plan:
  - The General Plan will range from 80 to 100 pages.
  - The Administrative Draft of the General Plan will be provided in Microsoft Word format. The City said WSP can assume one (1) round of consolidated comments from the City on the Administrative Draft. Up to three (3) WSP staff, and subconsultant staff as needed, will attend one (1), one-hour comment resolution virtual meeting to address questions and revisions. Up to 100 distinct individual department comments will be reviewed and addressed. This assumes that up to 50 comments are substantive comments.
  - The public review Draft will include the illustrative summary and General Plan chapters in the Santa Fe Forward Microsoft Word format aligned with the existing approved brand and design system. The illustrative summary is intended as a high level, non-technical overview and does not replace the full chapter documents in Microsoft Word format. The public review Draft illustrative summary will be delivered as a PDF.
  - The final General Plan document will incorporate revisions based on input from the general public. No additional revisions from City departments would be included at this step, but minor refinements from the Planning and Land Use Department will be considered and incorporated. No new policy writing, technical analysis, or content development is included, unless determined as necessary by WSP or based on the clause in paragraph 2, page 1 of this document. The final General Plan document will be delivered as both a PDF and in Word.
  - The final General Plan document will be designed for print-ready and accessible digital formats and include the illustrative summary to highlight key aspects of the plan for a broader, non-technical audience. The digital version of the plan will be made available on Santa Fe Forward and crosslinked to the City’s website and the Digital User Platform.
- Assumes mileage for three (3) round trips between Albuquerque and Santa Fe for the Project Manager.
- Subconsultant participation at Stage Gate 4 is virtual. WSP Project Manager will attend in-person.
- No overnight or out-of-state travel is included for any WSP staff.

### **Deliverables**

- One (1) Plan Charrette Working Session, up to four (4) hours in length. Up to three (3) WSP staff will participate, and subconsultant staff as allowed by budget.
- One (1) one-hour comment resolution virtual meeting to address questions and revisions on the Administrative Draft.
- One (1) of each: Administrative Draft, public review Draft and final updated General Plan document.

| WSP Scope Item                               | Labor Hours | Not to Exceed Price |
|--|-------------|---------------------|
| <b>Assumed Fiscal Year 2026</b>              | <b>186</b>  | <b>\$32,651.00</b>  |
| Plan Charrette Working Session               | 18          | \$4,567.00          |
| Administrative and Draft Plan Documents      | 168         | \$27,913.00         |
| Direct Expenses                              |             | \$171.00            |
| <b>Assumed Fiscal Year 2027</b>              | <b>100</b>  | <b>\$16,525.00</b>  |
| Final Plan Document                          | 100         | \$16,440.00         |
| Direct Expenses                              |             | \$85.00             |
| <b>Total WSP hours and fee for this task</b> | <b>286</b>  | <b>\$49,176.00</b>  |

**ADOPTION**

WSP, in coordination with STV Inc., will guide the final General Plan through the formal adoption process, supporting City staff from Planning Commission recommendation to Governing Body approval. The team will prepare a clear presentation with help from City staff; and assist in preparing talking points to brief decisionmakers to ensure they have the information needed for confident action.

**Assumptions**

- Assumes mileage for four (4) round trips between Albuquerque and Santa Fe for the Project Manager.
- STV Inc. staff and WSP Project Manager will attend up to two (2) hearings in person.
- One (1) night of overnight, out-of-state travel included for Christian Lopez only. No additional overnight or out-of-state travel is included for any other WSP staff. One (1) night of overnight travel is assumed for Manjeet Ranu for adoption.

**Deliverables**

- One (1) draft and one (1) final presentation for the Planning Commission and Governing Body. This presentation will be suitable to be shared at various committees leading up to the Planning Commission and Governing Body.
- Attendance and participation at the Planning Commission and Governing Body adoption hearings by WSP project manager and STV Inc. only.

| WSP Scope Item                        | Labor Hours | Not to Exceed Price |
|---------------------------------------|-------------|---------------------|
| <b>Assumed Fiscal Year 2027</b>       | <b>88</b>   | <b>\$16,980.00</b>  |
| Preparatory Charrette Working Session | 8           | \$2,081.00          |
| Briefings                             | 24          | \$3,787.00          |
| Planning Commission                   | 22          | \$3,954.00          |
| Adoption Hearing                      | 34          | \$6,229.00          |
| Direct Expenses                       |             | \$929.00            |

## IMPLEMENTATION ACTION PLAN

### WSP

The Implementation Action Plan will provide a detailed strategy to implement the goals and policies in the Santa Fe Forward General Plan. The final Implementation Action Plan will be delivered in two parts: a one-page illustrative roadmap and a white paper version in Microsoft Word. The illustrative roadmap will visually summarize implementation priorities, sequencing, and relationships among actions. The roadmap will be designed to communicate “how the plan becomes action” in a clear, intuitive, and graphic forward format suitable for a broad public audience.

The one-page Implementation Action Plan roadmap will be supported by a companion Microsoft Word document that provides additional detail and context. The Word document will be formatted to align with the Santa Fe Forward and City of Santa Fe brand while remaining functional for formal reference, updates, and implementation tracking. All materials will be compatible with both print and digital formats and will comply with ADA accessibility standards.

Development of the Implementation Action Plan will be led by STV Inc. and Design Workshop as described in the scope section below. WSP will complete the following scope to support the development of the Implementation Action Plan:

- Lead one (1) Work Program Charrette Working Session with City staff and project partners to establish technical objectives, organizational structure and design direction for the Implementation Action Plan.
- Lead QA/QC review of the administrative draft, public review draft and final Implementation Action Plan document.
- Lead design and formatting:
  - Design a one-page illustrative Action Plan roadmap that visually communicates plan implementation.
  - Translate existing implementation content into a clear, public-facing graphic format emphasizing clarity and visual storytelling.
  - Develop icons, diagrams, timelines, and visual elements that support understanding of actions, phases, and priorities.
  - Ensure the Action Plan reflects the Santa Fe Forward and City of Santa Fe brand identity.
  - Format a supporting Action Plan document in Microsoft Word, aligned visually with the one-page roadmap and overall brand.
  - Ensure consistency between the illustrative roadmap and the supporting Word document in terminology, hierarchy, and visual language.
  - Ensure all deliverables are suitable for both print and digital use.
  - Ensure all deliverables meet ADA accessibility requirements, including document structure, color contrast, typography, and digital readability.
  - Coordinate with City staff to review layout, clarity, and usability.

### Subconsultant – STV Inc.

Development of the Implementation Action Plan will be led by STV Inc. STV Inc. will complete the following scope to develop the Implementation Action Plan:

- Lead and prepare Implementation Action Plan Administrative Draft text. STV Inc. will be the primary author of the Implementation Action Plan and will collaborate with consultant team

subject matter experts to peer review proposed implementation measures. STV Inc. will provide one round of revision prior to the development of the public review Draft.

- Identify implementation measures for each element of the Santa Fe Forward General Plan based on the specific goals and policy measures. The Implementation Action Plan will include the following components:
  - a) Provide detailed Implementation Plan that ties each recommendation to achievable goals and objectives.
  - b) Each goal/objective should include a high-level proposed cost, assigned departmental responsibility, and timeline.
  - c) An Administration Plan with procedures for the following:
    - i) Annual progress and action reports
    - ii) C.I.P. Plan update process
    - iii) 5-year reviews
    - iv) 20-year update timeline from planned adoption year
    - v) Identify 40-80+ year elements

### **Subconsultant – Design Workshop**

Design Workshop will complete the following scope to develop the General Plan:

- Subject matter experts will support the development and review of proposed implementation measures in the Implementation Action Plan.

### **Subconsultant – Leland Consulting Group**

Leland Consulting Group will complete the following scope to develop the General Plan:

- Subject matter experts will support the development and review of proposed implementation measures in the Implementation Action Plan.

### **Assumptions**

- This task will identify implementation measures, including through an administrative governance policy and procedure review, but will not develop code or policy language, undertake the identified implementation, or other similar efforts.
- For the Implementation Action Plan:
  - The Administrative Draft of the Implementation Action Plan will be provided in Microsoft Word format. WSP assumes one (1) round of consolidated comments from the City on the Administrative Draft.
  - The public review Draft will include the one-page Illustrative Action Plan roadmap and companion Microsoft Word document that provides additional detail and context. The Microsoft Word format will be aligned with the existing approved brand and design system. The one-page Illustrative Action Plan roadmap is intended as a high level, illustrative summary and does not replace the detailed supporting document. The Public Review Draft will be delivered as a PDF.
  - The final Implementation Action Plan document will incorporate revisions based on input from the general public. No additional revisions from City departments would be included at this step, but minor refinements from City department heads and the Planning and Land Use Department will be considered and incorporated. No new content development is included. The final Implementation Action Plan document will be delivered in Microsoft Word and as a PDF.
- Graphics are illustrative and non-regulatory.

- Consultant team will provide streamlined equity guidance only, recommending that the City establish a separate effort to more effectively focus on equitable delivery and implementation of the updated General Plan.
- Assumes mileage for four (4) round trips between Albuquerque and Santa Fe for the Project Manager.
- Subconsultant participation at Stage Gate 5 is virtual. WSP Project Manager will attend in-person.
- No overnight or out-of-state travel is included for any WSP staff.

**Deliverables**

- One (1) Work Program Charrette Working Session up to three (3) hours in length. Up to four (4) WSP staff, and subconsultant staff as allowed by budget, will participate.
- One (1) Administrative Draft, Public Review Draft and final updated Implementation Action Plan document. The Implementation Action Plan includes:
  - One (1) one-page illustrative Action Plan roadmap
  - One (1) supporting Action Plan document, up to ten (10) pages (plus or minus three pages) formatted in Microsoft Word
- Final deliverables provided in print-ready and accessible digital formats

| WSP Scope Item   | Labor Hours | Not to Exceed Price |
|--|-------------|---------------------|
| <b>Assumed Fiscal Year 2027</b>  | <b>163</b>  | <b>\$30,817.00</b>  |
| Work Program Charrette Working Session                                   | 15          | \$3,344.00          |
| Administrative Policy and Procedures Review and Recommendations          | 20          | \$3,237.00          |
| Administrative Draft and public Review Draft Implementation Work Program | 52          | \$9,947.00          |
| Final Implementation Work Program  | 60          | \$11,045.00         |
| Equitable Delivery Guidelines  | 16          | \$2,902.00          |
| Direct Expenses  |             | \$342.00            |

**SUBCONSULTANT SCOPE AND FEE**

The scopes of work and associated efforts for each subconsultant are fully detailed within the corresponding tasks outlined above. Their total fees, inclusive of all labor and direct costs, are summarized in the table below and align with the task level responsibilities described in this scope of services.

| <b>Subconsultant Scopes</b>     | <b>Labor Hours</b> | <b>Not to Exceed Price</b> |
|---------------------------------|--------------------|----------------------------|
| <b>Assumed Fiscal Year 2026</b> |                    | <b>\$154,781.00</b>        |
| STV Inc.                        |                    | \$123,909.00               |
| Design Workshop                 |                    | \$24,479.00                |
| Leland Consulting Group         |                    | \$6,393.00                 |
| <b>Assumed Fiscal Year 2027</b> |                    | <b>\$90,673.00</b>         |
| STV Inc.                        |                    | \$59,801.00                |
| Design Workshop                 |                    | \$24,479.00                |
| Leland Consulting Group         |                    | \$6,393.00                 |
| <b>Total Subconsultant Fees</b> |                    | <b>\$245,454.00</b>        |

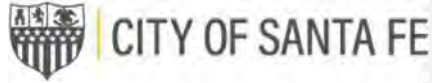
## COSTS

The table below presents three detailed breakouts of the total project cost: the original contract value; the original contract value inclusive of the previously approved Economic Development Strategy; and the combined total of the original contract, the Economic Development Strategy, and **this proposed amendment**. The proposed fee provided excludes New Mexico Gross Receipts Tax (GRT), though GRT is typically included in purchase orders issued by the City of Santa Fe. As a result, we have included estimated GRT amounts in the table below as well.

### Budget Contingency

The total authorized project budget is **\$650,000 inclusive** of NMGR. The scope of work and associated fee currently proposed totals **\$600,000**. This amount **does not include** any contingency funds to address unforeseen needs, potential scope refinements, or additional services that may arise during the course of the project.

| Scope Item   | Not to Exceed Price   |
|--|-----------------------|
| <b>Original Contract Value</b>   | <b>\$1,745,000.00</b> |
| Original Contract Value for Santa Fe General Plan Update, excluding NMGR                     | \$1,745,000.00        |
| Estimated 8.1875% NMGR   | \$142,872.00          |
| Total, including estimated NMGR  | \$1,887,872.00        |
| <b>Original Contract Value, with Economic Development Strategy</b>                           | <b>\$1,883,652.00</b> |
| Original Contract Value for Santa Fe General Plan Update, excluding NMGR                     | \$1,745,000.00        |
| Contract Value for Economic Development Strategy   | \$138,652.00          |
| Estimated 8.1875% NMGR   | \$154,220.00          |
| Total, including estimated NMGR  | \$2,037,872.00        |
| <b>Original Contract Value, with Economic Development Strategy and <u>this Amendment</u></b> | <b>\$2,483,652.00</b> |
| Original Contract Value for Santa Fe General Plan Update, excluding NMGR                     | \$1,745,000.00        |
| Contract Value for Economic Development Strategy   | \$138,652.00          |
| Contract Value for General Plan Update Amendment   | \$600,000.00          |
| Estimated 8.1875% NMGR   | \$203,349.00          |
| Total, including estimated NMGR  | \$2,687,001.00        |



## The Purchasing Memo

**Date:** November 18, 2025

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

Economic Development Advisory

**From:** Noah Tamas-Parris, Contracts Administrator

**Via:** Johanna Nelson, Office of Economic Development Director

**Subject:** Amendment to General Plan Update Contract

**Vendor Name:** WSP USA Inc.

**Munis Vendor Number:** 2960

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### ITEM AND ISSUE:

The Office of Economic Development respectfully requests your review and approval of an Amendment No. 1 to Contract #3250006 with WSP USA Inc. for Updating the General Plan. Amendment No.1 increases the amount of compensation (to add an economic development strategic plan to the scope of work) by \$150,000 for a total compensation of \$2,037,871.87.

**Commented [EM1]:** I actually do not like these to be written as the caption. Should be very similar but a sentence. No reason to put the person's name, again, here after it is in the memo heading. And, contact info is on the agenda.

### CONTRACT NUMBER:

The FY24 Munis contract number is #3250006

### BACKGROUND AND SUMMARY:

In 2024, The Land Use Department entered into a contract with WSP USA Inc. to update the current general plan. This was filed with the Clerk's office as 24-0352. In the summer of 2025, The Office of Economic Development, with the Land Use Department's permission, began with the vendor to explore adding an economic development strategic plan to the original contract's Scope of Work. On September 19<sup>th</sup>, this Scope of Work addition was finalized that fit within our budget of \$150,000 and we moved forward with the Land Use Department to amend the original contract to add this Economic Development Strategic Plan to the scope of work.

### PRIOR APPROVALS AND SUPPORTING INFORMATION:

#### FUNDING SOURCE:

**Fund Name/Number:** General Fund/100

**Munis Org Name/Number:** Economic Development/2122800

**Munis Object Name/Number:** Professional Contracts/510300

Budget Officer / Designee: Andy Hopkins Date: 11/19/2025

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

**PROCUREMENT METHOD:**

The procurement method used was NMSA 1978, Section 13-1-111, RFP. The General Plan Update Contract # 3250006 expires on 6/30/2028.

Chief Procurement Officer (CPO)/Designee: Johanna Lovato Montano Date: 11/20/2025

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

**ASSOCIATED APPROVALS:**

IT Components included?  Yes |  No

Approval: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Comment/Exceptions: \_\_\_\_\_

Treasury/Point of Sale Components included?  Yes |  No

Approval: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Comment/Exceptions: \_\_\_\_\_

Vehicles included?  Yes |  No

Approval: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Comment/Exceptions: \_\_\_\_\_

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

Approval: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Comment/Exceptions: \_\_\_\_\_

Is this an externally funded purchase?  Yes |  No

If yes, what is the issuing agency: \_\_\_\_\_

Approval: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Comment/Exceptions: \_\_\_\_\_

Is this a Capital Asset or Project?  Yes |  No

Project Ledger Number: \_\_\_\_\_

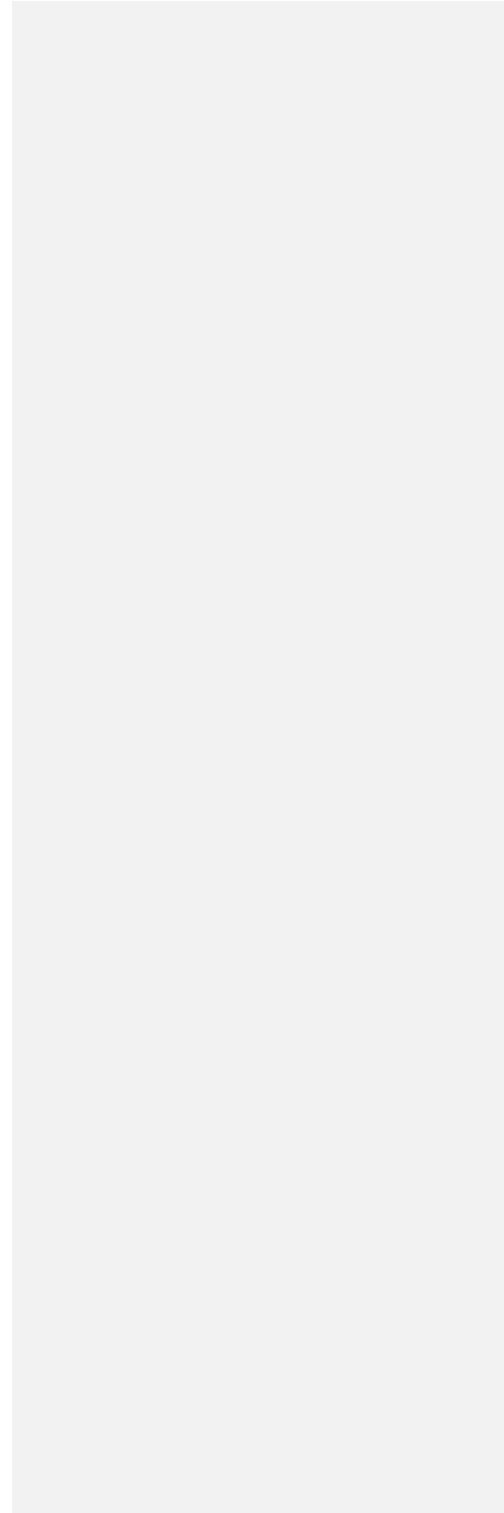
Approval: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Comment/Exceptions: \_\_\_\_\_

**ATTACHMENTS:**

If Amendment:

Original contract packet (with previous contract amendments)  
Contract Amendment Packet





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

4/25/2025

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

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

|   |   |                       |
|---|---|-----------------------|
| <b>PRODUCER</b><br>Arthur J. Gallagher Risk Management Services, LLC<br>300 Madison Avenue<br>28th Floor<br>New York NY 10017 | <b>CONTACT NAME:</b> AJG Service Team     |                       |
|   | <b>PHONE (A/C. No. Ext):</b> 212-994-7020 | <b>FAX (A/C. No):</b> |
| <b>E-MAIL ADDRESS:</b> GGB.WSPUS.CertRequests@ajg.com   |   |                       |
| <b>INSURER(S) AFFORDING COVERAGE</b>  |   | <b>NAIC #</b>         |
| <b>INSURER A :</b> Liberty Insurance Corporation  |   | 42404                 |
| <b>INSURER B :</b> Zurich American Insurance Company  |   | 16535                 |
| <b>INSURER C :</b>  |   |                       |
| <b>INSURER D :</b>  |   |                       |
| <b>INSURER E :</b>  |   |                       |
| <b>INSURER F :</b>  |   |                       |


**COVERAGES** **CERTIFICATE NUMBER:** 1890099155 **REVISION NUMBER:**

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

| INSR LTR | TYPE OF INSURANCE  | ADDL INSD | SUBR WVD | POLICY NUMBER  | POLICY EFF (MM/DD/YYYY)          | POLICY EXP (MM/DD/YYYY)          | LIMITS   |
|----------|--|-----------|----------|--|----------------------------------|----------------------------------|--|
| B        | <input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b><br><input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR<br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC<br>OTHER: | Y         | Y        | GLO9835819-12  | 5/1/2025                         | 5/1/2026                         | EACH OCCURRENCE \$ 3,500,000<br>DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 3,500,000<br>MED EXP (Any one person) \$ 10,000<br>PERSONAL & ADV INJURY \$ 3,500,000<br>GENERAL AGGREGATE \$ 14,000,000<br>PRODUCTS - COMP/OP AGG \$ 7,000,000<br>\$ |
| A        | <input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b><br><input checked="" type="checkbox"/> ANY AUTO<br><input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS<br><input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY                       |           |          | AS7-621-094060-035   | 5/1/2025                         | 5/1/2026                         | COMBINED SINGLE LIMIT (Ea accident) \$ 5,000,000<br>BODILY INJURY (Per person) \$<br>BODILY INJURY (Per accident) \$<br>PROPERTY DAMAGE (Per accident) \$<br>\$  |
|          | <input type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR<br><input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE<br>DED RETENTION \$   |           |          |  |                                  |                                  | EACH OCCURRENCE \$<br>AGGREGATE \$<br>\$   |
| A<br>A   | <input checked="" type="checkbox"/> <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below  | Y/N<br>N  | N/A      | WA7-62D-094060-015<br>WA7-62D-095609-075<br>WC7-621-094060-915 | 5/1/2025<br>5/1/2025<br>5/1/2025 | 5/1/2026<br>5/1/2026<br>5/1/2026 | <input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER<br>E.L. EACH ACCIDENT \$ 2,000,000<br>E.L. DISEASE - EA EMPLOYEE \$ 2,000,000<br>E.L. DISEASE - POLICY LIMIT \$ 2,000,000  |

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 THIRTY (30) DAYS NOTICE OF CANCELLATION.  
 Opportunity #US-WSP-202304667 | Project Description: General Plan Update for the City of Santa Fe, New Mexico.

The City of Santa Fe their officials, officers, employees, and agents are included as Additional Insured with respect to the General Liability policy as required by written agreement, pursuant to and subject to the policy's terms, definitions, conditions and exclusions. The coverage provided by the General Liability policy is primary and any other coverage shall be excess only, not contributing. Waiver of Subrogation applies to Additional Insured with respect to the General Liability policy as required by written agreement, pursuant to and subject to the policy's terms, definitions, conditions and exclusions.

|  |  |
|--|--|
| <b>CERTIFICATE HOLDER</b><br><br>City of Santa Fe<br>200 Lincoln Ave.<br>Santa Fe NM 87501 | <b>CANCELLATION</b><br><br>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.<br><br>AUTHORIZED REPRESENTATIVE<br> |
|--|--|

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Item #: 25-0563  
Munis Contract #: \_\_\_\_\_  
Original Contract Item #: 24-0352 \_\_\_\_\_  
SWPA/GSA/Coop/RFP/ITB #: \_\_\_\_\_

**CITY OF SANTA FE, ECONOMIC DEVELOPMENT  
AMENDMENT No. 1 TO  
Contract # 3250006**

General Plan Update Contract

This AMENDMENT No. 1 (the "Amendment") amends the CITY OF SANTA FE CONTRACT, dated May 31, 2024 (the "Contract"), between the City of Santa Fe (the "City") and WSP USA Inc. (the "Contractor"). The date of this Amendment shall be the date when it is executed by the City and the Contractor whichever occurs last.

**RECITALS:**

A. Under the terms of the Contract, Contractor has agreed to provide a comprehensive review and revision of the City of Santa Fe's General Plan.

B. Pursuant to Article 14 of the Contract, and for good and valuable consideration, the receipt and sufficiency of which are acknowledged by the parties, the City and the Contractor agree as follows:

1. SCOPE OF SERVICES

Article 1 of the Contract is amended to expand the scope of work to include the creation of an economic development plan for the City's Office of Economic Development. The contract has been amended, so that Article 1 reads as follows:

The Contractor shall facilitate a comprehensive review and revision of the City of Santa Fe's General Plan.

The Contractor shall provide the following services-for the City:

In response to RFP#24/20/P (Contract Exhibit 1 ), the Contractor proposes an alternative work plan

and modified process intended to provide an accelerated project timeline. The alternate process provided in the Contractor's Technical Proposal (Contract Exhibit 2) and Cost Proposal (Contract Exhibit 3) shall encompass all requested elements and shall be inclusive of services and work product deliverables detailed in the scope of work set forth in RFP #24/20/P.

The Contractor shall provide the following services, further described in the Contractor's Technical Proposal (Contract Exhibit 2) attached hereto, to the City as represented in their proposal to the City in response to RFP #24/20/P.

#### A. STEP 1 - Mobilization and Understanding

Approximately 9 months

Scope of work and deliverables:

1. Kickoff meeting and materials
2. Project management plan
3. Project SharePoint site
  
4. Digital User Platform development: Phase 4
5. Social Pinpoint Hub or other equivalent online civic engagement tool
6. Project communications brand, identity, supporting materials, and templates
7. Public Engagement Plan, inclusive of CHART and Midtown outreach considerations
8. Open house plans and materials, Community Conversation Kits, and other supporting public engagement materials in English and Spanish
9. Governance model
10. Administrative draft, public review draft and final assessment report completed in

two phases. **Phase 1** will document the analysis of existing conditions and trends. The draft report will be published on the project website for public comments and recommendations. **Phase 2** will incorporate the public engagement findings and the City's short-term and long-term needs and desires

#### B. STEP 2-Vision and Goals

Approximately 6 months

Scope of work and deliverables:

1. Public communications and engagement materials
2. Internal project team charrette to develop vision and goals
3. Administrative draft, public review draft and final vision statement
4. Administrative draft, public review draft and final goals
5. Place-type initial groups cross referenced to City's Land Development Code (LDC)
6. Digital User Platform development: Phase 2

#### C. STEP 3 - Scenario Planning

Approximately 6 months

Scope of work and deliverables:

1. Public communications and engagement materials
2. Scenario planning internal project team charrette
3. Place-type categories within each group identified in Step 2 coordinated with LDC
4. Six discussion draft scenario ideas for internal project team charrette
5. Three thematic, conceptual level scenarios with one-page brief for each with characterization and comparative analysis: administrative review, public draft review and final

6. Digital User Platform development: Phase 3

D. STEP 4 - Development of Preferred Plan

Approximately 6 months

Scope of work and deliverables:

1. Administrative draft, public review draft and final General Plan document with appendices
2. Public communications and engagement materials
3. General Plan document outlining internal project team charrette
4. Complete draft of place-types categories within each group, coordinated with LDC
5. Digital User Platform development: Phase 4

E. STEP 5 - Work Program and Funding Plan

Approximately 3 Months

Scope of work and deliverables:

1. Internal project team charrette to outline the General Plan document
2. Public communications and engagement materials
3. Administrative governance policy and procedure
4. Administrative draft, public review draft and final implementation work program
5. Equitable project development and delivery guidelines
6. Digital User Platform development: Phase 5

F. STEP FORWARD - Governing Body Action & Implementation and Evaluation

Approximately 3 Months

Scope of work and deliverables:

1. Public communications and engagement materials

2. Internal charrette to prepare for final action on General Plan and preparatory implementation steps
3. One decision-maker briefing PowerPoint presentation for City staff to use in briefing decision-makers
4. One Planning Commission hearing and presentation
5. One Governing Body hearing and presentation
6. Digital User Platform development: Phase 6

G. STEP ONGOING - Administrative Coordination + Engagement and Communication

Scope of work and deliverables:

1. Biweekly team agenda and notes
2. Quarterly LDC update team agenda and notes
3. Monthly e-newsletter
4. Periodic social media posts
5. PowerPoint presentations for periodic Planning Commission and Governing body updates conducted by City staff, including Step stage gates
6. Monthly progress reports and invoices

**Crosswalk illustrating Alternative Proposed Work Plan as compared to the RFP Scope of Work:**

| Table 1: Proposed Work Plan Steps  | CY2024 |    |    | CY2025 |    |    | CY2026 |    |    |
|--|--------|----|----|--------|----|----|--------|----|----|
|  | Q3     | Q4 | Q1 | Q2     | Q3 | Q4 | Q1     | Q2 | Q3 |
| STEP 1<br>Mobilization and Understanding                                   | █      | █  |    |        |    |    |        |    |    |
| STEP 2<br>Vision and Goals   |        |    | █  |        |    |    |        |    |    |
| STEP 3<br>Scenario Planning  |        |    |    | █      |    |    |        |    |    |
| STEP 4<br>Development of Preferred Plan                                    |        |    |    |        |    | █  |        |    |    |
| STEP 5<br>Work Program and Funding Plan                                    |        |    |    |        |    |    |        | █  |    |
| STEP → FORWARD<br>Governing Body Action + Implementation and Evaluation    |        |    |    |        |    |    |        |    | █  |
| STEP ONGOING<br>Administrative Coordination + Engagement and Communication | █      | █  | █  | █      | █  | █  | █      | █  | █  |

| Table 2: Crosswalk to RFP Work Plan  | Phase 1                    | Phase 2          | Phase 3         |
|--|----------------------------|------------------|-----------------|
| STEP 1<br>Mobilization and Understanding                                   | Task 1<br>Task 2<br>Task 3 | Task 4<br>Task 5 |                 |
| STEP 2<br>Vision and Goals   |                            |                  | Task 7          |
| STEP 3<br>Scenario Planning  |                            |                  | Task 6          |
| STEP 4<br>Development of Preferred Plan                                    |                            |                  | Task 7          |
| STEP 5<br>Work Program and Funding Plan                                    |                            |                  | Task 8          |
| STEP → FORWARD<br>Governing Body Action + Implementation and Evaluation    |                            |                  | Task 9          |
| STEP ONGOING<br>Administrative Coordination + Engagement and Communication | Task 1                     | Task 1 + Task 4  | Task 1 + Task 4 |

In addition, the contractor shall create an economic development strategic plan for the City’s Office of Economic Development as shown in attached Exhibit C.

**2. COMPENSATION.**

Article 3, paragraph A of the Contract is amended to increase the amount of compensation by a total of \$150,000 for the Economic Development strategic plan as outlined in attached exhibit D. Article 3, paragraph A reads in its entirety as follows:

A. Payment.

A. The City shall pay the Contractor in full payment for services satisfactorily performed based upon deliverables detailed above, at the rate of ONE MILLION, EIGHT

HUNDRED EIGHTY-THREE THOUSAND, SIX HUNDRED FORTY-EIGHT DOLLARS and

EIGHTEEN CENTS (\$1,883,648.18), excluding gross receipts tax. The

New Mexico gross receipts tax levied at the rate of 8.1875% on the amounts payable under this Contract totaling ONE

HUNDRED FIFTY-FOUR THOUSAND, TWO HUNDRED TWENTY-THREE DOLLARS and SIXTY-NINE CENTS (\$154,223.69) shall be paid by the City to the Contractor. The total amount

payable to the Contractor under this Contract, including gross receipts tax and expenses, shall not exceed TWO MILLION, THIRTY-SEVEN THOUSAND, EIGHT HUNDRED

SEVENTY-ONE DOLLARS and EIGHTY-SEVEN CENTS (\$2,037,871.87). This amount is a

maximum and not a guarantee that the work assigned to be performed by Contractor under this Contract 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 Contract 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 Contract being amended in writing prior to those services in

excess of the total compensation amount being provided.

3. CONTRACT IN FULL FORCE.

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

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

CITY OF SANTA FE:

CONTRACTOR:  
WSP USA INC.

  
Alan Webber (Dec 16, 2025 17:08:48 MST)

  
Matt Sibul (Nov 10, 2025 09:25:05 MST)

ALAN WEBBER, MAYOR


MATT SIBUL, REGIONAL TRANSPORTATION LEAD


DATE: Dec 16, 2025

DATE: Nov 10, 2025

NMBTIN: \_\_\_\_\_

ATTEST:

  
ANDREA SALAZAR (Dec 16, 2025 17:12:14 MST)

CITY CLERK   
GB MTG 12/10/2025

CITY ATTORNEY'S OFFICE:

  
Ruby Crews (Nov 10, 2025 09:26:25 MST)

ASSISTANT CITY ATTORNEY

APPROVED FOR FINANCES:

  
\_\_\_\_\_

FINANCE DIRECTOR

## Santa Fe Economic Development Strategy: Scoping

DRAFT 18 September 2025

### Project Understanding

The City recently commissioned a report from Ernst & Young analyzing the industry mix and overall economy of Santa Fe. That work, which relied on quantitative industry cluster analysis and stakeholder outreach, resulted in a set of industry targets and other recommendations intended to serve as a prelude to more in-depth strategy development, supported by additional analysis and focused engagement. A parallel effort is underway by the firm Motiva, designed to help the City strategically address its workforce development needs, with a broad scope but emphasis on underserved local populations.

In addition, as part of the *Santa Fe Forward* comprehensive plan update process, Leland Consulting Group (“Leland”) just completed an assessment of past economic development strategy documents along with fresh analysis of trends and existing conditions related to employment, industry mix, commercial development, and other factors influencing Santa Fe’s prospects for improved economic vitality.

Importantly, the New Mexico EDD recently completed its *2025 State Plan Update* to guide statewide economic development activity, including major policy recommendations related to data sharing and visualization, infrastructure investments promoting local site readiness across the state, guidelines for careful diversification away from extractive industries, and strategies for better leveraging federal funding. These policy initiatives, though broad and statewide, are ultimately geared towards improving economic improvement at the local level.

The effort proposed here is intended as a logical extension and complement to those efforts. The resulting consolidated strategic plan and implementation roadmap will serve as a long-overdue update to the 2004 plan of action to guide the Office of Economic Development in fostering economic vitality – capitalizing on the strengths of Santa Fe to attract, expand, and retain quality firms and individuals, while removing barriers to business success and growth. While that plan needs to be grounded in a rigorous quantitative understanding of the industry structure of the city and the surrounding region, it should also acknowledge and creatively leverage the unique blend of attributes that have long given Santa Fe an economically valuable perceptual advantage.

## Task 0: Kickoff and Internal Team Coordination

- Kickoff meetings with OED and other relevant City staff (including Mayor and other key leadership)
- Scope consensus-building: What do we want to get out of this?
- Ensuring formal roles for stakeholders without forming yet another steering committee.

### Deliverable:

- Internal summary memo

### Timing:

- 2-3 weeks

**In-person site visit**

## Task 1: Coordination with Other Economic Development Organizations

Engage existing economic development stakeholder groups to inform them about this effort, ensure that the Santa Fe team is up to date on those organizations' recent and ongoing efforts, and explore potential additional engagement targets.

- NCNMEDD
- Regional Development Corporation (RDC)
- MRCOG
- Northern Area Local Workforce Development Board
- Tourism Santa Fe
- Santa Fe Chamber of Commerce
- State of NM Economic Development Department
- Other City boards and commissions with stake in economic development
- Many others (~30 stakeholder area groups in all)

### Deliverable:

- Technical memo summarizing ongoing parallel efforts and roles across economic development organizations the region and state;

### Timing:

- 2-3 weeks, including prep.

**Virtual/in-person combo**

## Task 2: Community Engagement

- **Community survey:** work with project team to craft questionnaire(s) about perceptions of SF strengths and weaknesses, along with resident desires for specific areas of economic and commercial growth. Coordinate sampling and fielding efforts to sync with ongoing engagement/outreach activities in *Santa Fe Forward*.
- **Business/industry survey:** develop questionnaire(s) for members of the business community about SF strengths and weaknesses, desires for specific areas of economic and commercial growth, and with perceived barriers to successful operations and growth.
  - Both the community and business/industry survey engagement efforts will be fully bilingual in Spanish and English.

### Deliverable:

- Questionnaire and sampling/fielding plan draft
- Memo summarizing survey findings (timing TBD)
- Full electronic database of survey responses

### Timing:

- 4-5 weeks, including prep.; note that survey fielding will take longer -- running parallel to multiple subsequent tasks.

## Task 3: Refinement of Industry/Cluster Targeting

- Conduct peer review of Ernst & Young analysis and findings relative to industry mix, clusters, and targeting. Preliminary recommendations from that study, shown below, include many targets related to those identified in the Santa Fe's prior economic development strategy (Angelou 2004) along with some additions and refinements.

| Potential target industry (2025)               | 2004 strategy           |  |
|--|-------------------------|--|
| Arts, design & media                           | Arts & culture          | Arts and Culture                                 |
|  | Design                  | Design   |
|  | Film, TV, media         | Publishing and New Media                         |
| Tourism, recreation & specialty consumer goods | Hospitality             | Hospitality                                      |
|  | Specialty retail        | Outdoor Gear and Apparel                         |
|  | Specialty manufacturing |  |
| Technology development                         | Software                | Software Development                             |
|  |                         |  |
|  | Scientific R&D          | Water Conservation and Clean Energy Technologies |
| Professional services                          |                         |  |

DRAFT

### Deliverable:

- Interim technical memo with summary of industry structure, trends, and targets

### Timing:

- 4-5 weeks

**No site visit**

- Revisit and refine findings and recommendations from the E&Y study and from Leland’s economic development chapter in the *Santa Fe Forward* Assessment Report.
- Examine the above Santa Fe-specific findings in the context of plans from broader geographies, with special emphasis on the *2025 State Plan Update* just completed by the New Mexico EDD to guide statewide economic development. Major strategic initiatives identified in that plan need to be directly and efficiently leveraged in Santa Fe’s updated strategy.
- Gather and analyze information from national and regional industry publications within targeted sectors to better understand industry trends including evolving workforce, infrastructure, and space needs. (To be explored further in Task 4 outreach)

## Task 4: Employer Engagement

- Engage with representatives of major private-sector employers in Santa Fe (and potentially elsewhere in the region) to discuss strengths, weaknesses, opportunities, and threats related to operating in Santa Fe.
- Topics of this outreach should include, but not be limited to:
  - growth prospects and what is currently “working” in terms of City policies, services, and investments
  - barriers to growth
  - emerging supply chain clusters
  - workforce development needs (education, training, etc.)
  - infrastructure requirements/desires (transportation, water, etc.)
  - public policy, including land use/zoning
- Some employers may have site-specific observations and concerns that involve City policies and priorities already being given consideration in the parallel *Santa Fe Forward* effort.

### Deliverable:

- Technical memo on cluster/target analysis review with refined SWOT analysis based on employer engagement in combination with learning from prior tasks

### Timing:

- 4-5 weeks

**Multi-day in-person site visit**

## Task 5: Coordination, Engagement Related to Workforce Development

- Meet with Motiva to understand status/direction of their workforce development strategy efforts and share preliminary findings and recommendations.
- Meet with secondary and higher education (UNM, NMSU, SFCC, St. John's) representatives [particularly entrepreneurial programs within those].
  - Evaluate how an educational anchor could reinforce creative sector ecosystem and talent retention.
- Meet with other education/arts groups to explore local arts engagement programs as economic development tools. These conversations should be informed in part by the *2024 Creative Industries Study* completed for the New Mexico EDD.
- Analyze housing affordability and housing mix in relation to workforce development and recruiting goals. This analysis should be coordinated with housing-related analysis and recommendations emerging in the *Santa Fe Forward* effort.

### Deliverable:

- Report on workforce development key findings and strategy implications

### Timing:

- 4-5 weeks

**In-person visit supplemented with remote interviews.**

## Task 6: Identification and Evaluation of Potential Opportunity Sites

- Meet with planning staff and coordinate with *Santa Fe Forward* future land use mapping effort to understand key remaining areas of potential growth (via either new development or re-development), with focus on areas of non-residential growth.
- Evaluate identified candidate areas relative to draft industry targets, employer outreach findings, and other input from prior tasks.
- Develop high-level strategic profiles and recommendations for promising catalyst areas of potential development.

### Deliverable:

- Map(s) and technical memo with high-level strategic recommendations

### Timing:

- 4-5 weeks

**In-person visit supplemented**

## Task 7: Situational Analysis and Strategic Framework

- **Synthesize findings** from all previous tasks into a comprehensive assessment of Santa Fe's current economic position.
- Summarize **key challenges**, barriers, and constraints limiting and influencing economic growth for Santa Fe.
- Document specific **opportunities** emerging from industry analysis, stakeholder engagement, and site evaluation.
- Develop clear **problem statements** that connect community needs with economic development solutions.
- Present **integrated SWOT analysis** that builds on E&Y work but incorporates new insights from community and employer engagement.

### Deliverable:

- Situational Analysis Report summarizing key challenges, opportunities, and strategic priorities identified through data analysis and stakeholder engagement

### Timing:

- 3-4 weeks

## Task 8: Draft Goals, Strategies, and Action Plan

- Translate the situational analysis and strategic framework into a limited set of (5 to 7) broad goals to guide how the Office of Economic Development can strengthen and diversify Santa Fe's economy.
- Break down each broad goal into a set of (2 to 5) more specific *strategies*, which will, in turn, be accompanied by a number of concrete *action* items written in the form of prioritized instructions that can be implemented by the OED and clearly identified partners.
- Through this process, we will move forward those project areas that are most critical to moving forward, and we may deemphasize those that, while important, simply cannot move forward immediately given higher priorities and organizational capacity.
- For each action item, we will assign:
  - a timeframe within the next five years
  - a rough order of magnitude cost estimate
  - the role of key implementing partners,
  - objective metrics and performance indicators that should be tracked to monitor progress and make adjustments,
  - other necessary notes attributes that will help translate the action plan into a practical day-to-day guide and work plan.
- At a minimum, we expect the strategy to address implementation in the following areas:
  - A refined set of **industry targets** and targeting-related guidelines
  - A clear statement of Santa Fe's **strategic differentiators**: perceptual advantages that should be intentionally leveraged
  - Identify **policies changes and investments** that directly **address and mitigate identified barriers** to business success, attraction, and retention in Santa Fe
  - Recommended policies and actions for how the OED can help to promote a better fit between Santa Fe's labor force and the city's **housing options**

### Deliverable:

- Draft economic development strategy and action plan

### Timing:

- 6-8 weeks

**Work session can be combination remote/in-person**

- High-level identification of, and recommendations for, **key opportunity sites/nodes/corridors** within Santa Fe that are closely tied to its economic development goals
- Policies and actions related to how the OED can contribute in a complementary role in support of industries and businesses dependent of visitors.
- **Workforce:** address ways to bolster the supply of well-qualified workers to support economic vitality across the board
- **Higher education:** recommendations for how OED, with the help of partners, can work towards attracting a significant campus presence in Santa Fe
- **Work Session:** Once the draft action plan is ready, we will review with OED and relevant City staff prior to scheduling a city council work session where we will present our findings and gather feedback.

## Task 9: Final Strategy/Action Plan Document

- **Final Economic Development Strategic Action Plan:** We will take the feedback gathered from Task 5 and prepare a final report suitable for adoption or acceptance by the city council.
  - We expect the document to serve as both an internal resource and an external statement of Santa Fe’s commitment to economic development. As such, it will be highly graphical, with significant use of maps, graphics, charts, and tables to make it readable and keep it brief.
  - Reporting and recommendations will be integrated with the *Santa Fe Forward Digital User Platform*.
- [optional] Develop stakeholder engagement plan to promote strategy adoption of findings/recommendations across a wider audience of key leadership and organizations.

### Deliverable:

- Final economic development strategy and action plan

### Timing:

- 3-4 weeks

**In-person site visit for final presentations**



# EXHIBIT D

City of Santa Fe General Plan Update  
Contract #3204702

September 19, 2025

Johanna Nelson, Director  
Office of Economic Development  
City of Santa Fe  
200 Lincoln Avenue, Box 909  
Santa Fe, NM 87505  
cc: Heather Lamboy, Director, Planning & Land Use Department

**Re: Contract #3204702 and Economic Development Strategy**

Dear Johanna,

Thank you for allowing us to submit this cost proposal for the City of Santa Fe Economic Development Strategy, in conjunction with Leland Consulting Group and under the City of Santa Fe General Plan Update (Contract #3204702).

Based on the scope of work provided, we have developed a proposed cost in the amount of **\$150,000.00**, which includes an estimated **New Mexico Gross Receipts Tax (8.1875%)**, of **\$11,352.00**, which is to be paid separately by the City of Santa Fe.

We are available to start work immediately upon receipt of a contract amendment and purchase order, or other mutually approved written Notice to Proceed. If you have any questions during your review of our cost proposal, please contact me (505-870-4449; [nick.fazio@wsp.com](mailto:nick.fazio@wsp.com)). On behalf of WSP USA and Leland Consulting Group, thank you for the opportunity to continue our work for the City Different!

Sincerely,  
WSP USA, Inc.

Nick Fazio  
Assistant Vice President, Communications and Public Involvement  
WSP USA, Inc.



### DESCRIPTION OF SERVICES

A description of services and scope of work is provided as a separate attachment, dated September 18, 2025.

### COSTS AND SCHEDULE

WSP proposes to provide these services on a lump sum basis for a total of **\$138,648.00**, not including applicable New Mexico Gross Receipts Tax of **\$11,352.00**, which is to be paid separately by the City of Santa Fe. This brings the total cost to **\$150,000.00**.

| Scope Item   | Hours      | Not to Exceed Price |
|--|------------|---------------------|
| <b>Labor</b>   |            |                     |
| Task 0: Kickoff and Internal Team Coordination                   | 48         | \$8,360.00          |
| Task 1: Coordination w/ Other Economic Development Orgs.         | 58         | \$9,516.00          |
| Task 2: Community Engagement                                     | 182        | \$23,041.00         |
| Task 3: Refinement of Industry/Cluster Targeting                 | 43         | \$8,240.00          |
| Task 4: Employer Engagement                                      | 66         | \$10,716.00         |
| Task 5: Coordination/Engagement Related to Workforce Dev.        | 63         | \$10,047.00         |
| Task 6: Identification/Evaluation of Potential Opportunity Sites | 41         | \$8,135.00          |
| Task 7: Situational Analysis and Strategic Framework             | 64         | \$12,515.00         |
| Task 8: Draft Goals, Strategies, and Action Plan                 | 121        | \$24,156.00         |
| Task 9: Final Strategy and Action Plan Document                  | 70         | \$13,815.00         |
| <b>Subtotal</b>  | <b>756</b> | <b>\$128,541.00</b> |
| <b>Direct Expenses (no mark-up)</b>                              |            |                     |
| Mileage Reimbursement  |            | \$427.00            |
| Travel expenses  |            | \$9,380.00          |
| Vehicle charges  |            | \$300.00            |
| <b>Subtotal</b>  |            | <b>\$138,648.00</b> |
| NMGRT @ 8.1875%  |            | \$11,352.00         |
| <b>Total</b>   |            | <b>\$150,000.00</b> |



September 19, 2025

Johanna Nelson, Director  
Office of Economic Development  
City of Santa Fe  
200 Lincoln Avenue, Box 909  
Santa Fe, NM 87505  
cc: Heather Lamboy, Director, Planning & Land Use Department

**Re: Contract #3204702 and Economic Development Strategy**

Dear Johanna,

Thank you for allowing us to submit this cost proposal for the City of Santa Fe Economic Development Strategy, in conjunction with Leland Consulting Group and under the City of Santa Fe General Plan Update (Contract #3204702).

Based on the scope of work provided, we have developed a proposed cost in the amount of **\$150,000.00**, which includes an estimated **New Mexico Gross Receipts Tax (8.1875%)**, of **\$11,352.00**, which is to be paid separately by the City of Santa Fe.

We are available to start work immediately upon receipt of a contract amendment and purchase order, or other mutually approved written Notice to Proceed. If you have any questions during your review of our cost proposal, please contact me (505-870-4449; [nick.fazio@wsp.com](mailto:nick.fazio@wsp.com)). On behalf of WSP USA and Leland Consulting Group, thank you for the opportunity to continue our work for the City Different!

Sincerely,  
WSP USA, Inc.

A handwritten signature in black ink, appearing to read 'Nick Fazio'.

Nick Fazio  
Assistant Vice President, Communications and Public Involvement  
WSP USA, Inc.



**DESCRIPTION OF SERVICES**

A description of services and scope of work is provided as a separate attachment, dated September 18, 2025.

**COSTS AND SCHEDULE**

WSP proposes to provide these services on a lump sum basis for a total of **\$138,648.00**, not including applicable New Mexico Gross Receipts Tax of **\$11,352.00**, which is to be paid separately by the City of Santa Fe. This brings the total cost to **\$150,000.00**.

| Scope Item   | Hours      | Not to Exceed Price |
|--|------------|---------------------|
| <b>Labor</b>   |            |                     |
| Task 0: Kickoff and Internal Team Coordination                   | 48         | \$8,360.00          |
| Task 1: Coordination w/ Other Economic Development Orgs.         | 58         | \$9,516.00          |
| Task 2: Community Engagement                                     | 182        | \$23,041.00         |
| Task 3: Refinement of Industry/Cluster Targeting                 | 43         | \$8,240.00          |
| Task 4: Employer Engagement                                      | 66         | \$10,716.00         |
| Task 5: Coordination/Engagement Related to Workforce Dev.        | 63         | \$10,047.00         |
| Task 6: Identification/Evaluation of Potential Opportunity Sites | 41         | \$8,135.00          |
| Task 7: Situational Analysis and Strategic Framework             | 64         | \$12,515.00         |
| Task 8: Draft Goals, Strategies, and Action Plan                 | 121        | \$24,156.00         |
| Task 9: Final Strategy and Action Plan Document                  | 70         | \$13,815.00         |
| <b>Subtotal</b>  | <b>756</b> | <b>\$128,541.00</b> |
| <b>Direct Expenses (no mark-up)</b>                              |            |                     |
| Mileage Reimbursement  |            | \$427.00            |
| Travel expenses  |            | \$9,380.00          |
| Vehicle charges  |            | \$300.00            |
| <b>Subtotal</b>  |            | <b>\$138,648.00</b> |
| NMGRT @ 8.1875%  |            | \$11,352.00         |
| <b>Total</b>   |            | <b>\$150,000.00</b> |



CITY OF SANTA FE  
**PLANNING & LAND USE**

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DATE: May 16, 2024

TO: Mayor Webber and City Council  
Finance and Quality of Life Committees

VIA: Emily Oster, Finance Department Director  
Travis Dutton-Leyda, Chief Procurement Officer  
Rich Brown, Community Development Department Director *RB*  
Jason Kluck, Planning & Land Use Department Director *jmk*

FROM: Heather L. Lamboy, AICP, Assistant Director, Planning & Land Use Department *HLL*

SUBJECT: General Plan Update Contract

VENDOR: WSP USA, Inc.

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**ITEM AND ISSUE**

Request for Approval of a Professional Services Agreement with WSP USA, Inc, to Update the General Plan and Create a Digital User Platform In the Total Amount of \$1,887,871.87, Inclusive of NMGRT for a Four Year Term.

**BACKGROUND AND SUMMARY**

The General Plan is adopted by resolution and is the comprehensive planning document that sets the City of Santa Fe's (City's) official policies guiding the long-ranging planning of physical growth, community development, and public services, as well as the City's goals for subjects including equity, inclusion, sustainability, affordability, and mobility. The General Plan is composed of several chapters, each focusing on specific topics related to the planning and development of the city. The goals and objectives of each chapter are used to set City policy and are implemented through the City's Code of Ordinances, regulating documents such as the Future Land Use Map, comprehensive planning efforts, and other mechanisms.

The last comprehensive update of the currently adopted General Plan was in 1999, after several years of community engagement, research, and drafting. Since 1999, the city has seen significant population growth, infrastructure and sustainability concerns and economic fluctuations, and thus much of the data supporting the 1999 plan is now out of date. Additionally, realignment with the City's Capital Improvement Plan is needed. Finally, it should be acknowledged that 20-25 years is generally considered to be the lifespan of a city-wide plan such as Santa Fe's General Plan.

This contract proposes that the process for the General Plan Update be informed by a robust community conversation addressing the issues raised by the Governing Body, the associated recommendations in



**CITY OF SANTA FE  
PLANNING & LAND USE**

the Governing Body resolution that was approved on March 24, 2023, and other recommendations and subject matter for consideration as identified, such as growth planning and management, mobility and accessibility, adaptability, resiliency and sustainability, inclusion and equity, and economic strength and opportunity. Furthermore, the contract calls for staff and the consultant to undertake efforts to evaluate the 1999 plan to identify its strengths and deficiencies. This will help ensure that proposed policies are informed by the successes and beneficial outcomes, as well as the shortcomings, of the current plan and will best address the needs of the Santa Fe community.

Included in the scope of work is the development of a digital platform that will not only provide information on the General Plan Update process, but also the Zoning Code update process, community engagement associated with both projects, and a robust Geographic Information Systems (GIS) platform where community members can access information on subdivision plats, development plans, special use approvals, historic preservation inventory forms, building permits, and much more. The development of this platform will provide more accessible information which could assist in reducing the overall number of public information (IPRA) requests.

The consultant offered an accelerated Work Plan that will shorten the duration of the update project. The intent of this accelerated pace is to ensure that the General Plan aligns with Phase 3 of the Land Development Code update, where the consultants of the two projects will review the draft General Plan and Land Development Code updates to ensure consistency between the two documents.

**Crosswalk illustrating Alternative Proposed Work Plan as compared to the RFP Scope of Work:**

| Table 1: Proposed Work Plan Scope  | CY2024 |    |    |    | CY2025 |    |    |    | CY2026 |    |    |    |
|--|--------|----|----|----|--------|----|----|----|--------|----|----|----|
|  | Q1     | Q2 | Q3 | Q4 | Q1     | Q2 | Q3 | Q4 | Q1     | Q2 | Q3 | Q4 |
| STEP 1<br>Mobilization and Understanding                                     | █      | █  |    |    |        |    |    |    |        |    |    |    |
| STEP 2<br>Vision and Goals   |        |    | █  |    |        |    |    |    |        |    |    |    |
| STEP 3<br>Scenario Planning  |        |    |    | █  |        |    |    |    |        |    |    |    |
| STEP 4<br>Development of Preferred Plan                                      |        |    |    |    |        |    | █  |    |        |    |    |    |
| STEP 5<br>Work Program and Funding Plan                                      |        |    |    |    |        |    |    |    |        |    | █  |    |
| STEP → FORWARD<br>Governing Body Action + Implementation and Evaluation      |        |    |    |    |        |    |    |    |        |    |    | █  |
| STEP → ONGOING<br>Administrative Coordination + Engagement and Communication | █      | █  | █  | █  | █      | █  | █  | █  | █      | █  | █  | █  |

| Table 2: Crosswalk to RFP Work Plan  | Phase 1                    | Phase 2            | Phase 3            |
|--|----------------------------|--------------------|--------------------|
| STEP 1<br>Mobilization and Understanding                                     | Task 1<br>Task 2<br>Task 3 | Task 4<br>Task 5   |                    |
| STEP 2<br>Vision and Goals   |                            |                    | Task 7             |
| STEP 3<br>Scenario Planning  |                            |                    | Task 6             |
| STEP 4<br>Development of Preferred Plan                                      |                            |                    | Task 7             |
| STEP 5<br>Work Program and Funding Plan                                      |                            |                    | Task 8             |
| STEP → FORWARD<br>Governing Body Action + Implementation and Evaluation      |                            |                    | Task 9             |
| STEP → ONGOING<br>Administrative Coordination + Engagement and Communication | Task 1                     | Task 1 +<br>Task 4 | Task 1 +<br>Task 4 |

Given these considerations, the Planning and Land Use Department seeks to contract approval for consulting services for an update of the City's General Plan. This RFP will include a detailed project



CITY OF SANTA FE  
**PLANNING & LAND USE**

description and scope of work for the General Plan update. The consultant(s) will be selected based on their proposals, experience and estimated budget.

New Mexico Statutes 1978, Chapter 3, Article 19, Planning and Platting and Article 21, Zoning Regulations, outline the City's responsibility to adopt a "master plan", also referred to as a "comprehensive plan". For consistency's sake, this memo and the resolution for the RFP refer to the City's "General Plan," instead of a "master plan" or "comprehensive plan," as the document under consideration.

CONTRACT NUMBER

The FY2024 Munis contract number is 3204702

PROCUREMENT METHOD

The Department completed an RFP procurement for these professional services, the contract expires June 30, 2028.

FUNDING SOURCE

The funding source is:

Fund Name/Number: General Fund 100

Munis Org Name/Number: Land Use 1004501

Munis Object Name/Number: Professional Contracts 510300

Total: \$1,887,871.87

CAPITAL ASSET

Yes  No

CAPITAL PROJECT

Yes  No

ACTION REQUESTED

The Community Development Department respectfully requests your review and approval of the General Plan Update contract.

ATTACHMENTS:

1. Signed Contract
2. Memo to Quality of Life Committee, Finance Committee, and Governing Body
3. Procurement Checklist
4. Summary of Contract
5. Certificate of Liability
6. WSP Business Registration

**Signature:** *Jason M. Kluck*

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

**Signature:** *Richard Brown*

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

# CITY OF SANTA FE PROCUREMENT CHECKLIST



**Contractor Name:** WSP USA, Inc.

**Procurement/contract Title:** General Plan Update

**Procurement Method/Vehicle:**  Sole Source  State Price Agreement/Existing  Cooperative  Request For Proposals(RFP)  Invitation To Bid (ITB)  Exempt: 13-1-98

Small Purchase (Contract Under \$60,000)  Other: \_\_\_\_\_

**Requesting Department:** Community Development      **Staff Name:** Heather Lamboy

**Procurement Requirements:**

Procurement files shall be maintained for all purchases and contracts, regardless of the method of procurement. The procurement files shall contain the basis on which the awards are made, all submitted bids/proposals, all evaluation materials (bid tabs or Evaluation Committee Reports), scoresheets, quotations, and all other documentation related to or prepared in conjunction with evaluations, negotiations, and the award processes. The procurements shall contain written determinations from the Requesting Departments, signed by the Chief Procurement Officers (this document), setting forth the reasoning for the contract award decisions before submitting them to the Committees.

**REQUIRED DOCUMENTS FOR APPROVAL BY PURCHASING (CPD)**

| YES                                 | N/A                      |  | YES                                 | N/A                      |   |
|-------------------------------------|--------------------------|--|-------------------------------------|--------------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Written Determination (srvs)   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Quote(s) (3 Valid & Current for Over 20k) |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | RFP - Confidential info to be provided to GB by CPD Buyer  | <input type="checkbox"/>            | <input type="checkbox"/> | BAR                                       |
| <input type="checkbox"/>            | <input type="checkbox"/> | ITB (include bid tab)  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | FIR                                       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Other: _____   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Certificate of Insurance (srvs)           |
| <input type="checkbox"/>            | <input type="checkbox"/> | Cooperative Agreements and GSAs and Statewide Price Agreements (include the cover page to show valid date, page, and items to be purchased)  |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Horizon Declination or Screenshot of <a href="http://horizonsofnewmexico.org/services.html">horizonsofnewmexico.org/services.html</a> (srvs) |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Summary of Contract (only on contracts)  |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Current Santa Fe Business Registration (or Exemption if no tax)  |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Executed Contract or Price Agreement (legal and contractor must sign before purchasing approves)   |                                     |                          |   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Chief Procurement Officer (or designee) Approval for Exempt from Procurement (use memo on our site)  |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Evaluation Committee Report (RFPs only)  |                                     |                          |   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Signed Sole Source Determination, Vendor Written Quote, SS Letter from Contractors, and 30 Days Email  |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | >20k = Memo addressed to City Manager (Under 150K) Committees/City Council (Over 150K)   |                                     |                          |   |

|                             |  |                     |
|-----------------------------|--|---------------------|
| <u>Heather Lamboy</u>       | <u>Assistant Director, Planning &amp; Land Use</u> | <u>5-16-2024</u>    |
| Department Point of Contact | Title  | Date                |
| <u>Jason M. Kluck</u>       |  | <u>05/20/2024</u>   |
| Department Director         |  | Date                |
| <u>[Signature]</u>          |  | <u>May 21, 2024</u> |
| Chief Procurement Officer   |  | Date                |
| _____                       | _____  | _____               |
| ITT Representative          | Title  | Date                |



# City of Santa Fe

## Summary of Contract, Agreement, Amendment & Lease

All applicable fields to be completed by department (complete 1.b only if you are processing an amendment):

1.a Munis Contract: 3204702 Procurement # (RFP/ITB# If any): 24/20/P

Contractor: WSP USA, Inc.

Procurement Method/Vehicle: Small Purchase  RFP  ITB  Sale Source  GSA  Cooperative  Exempt  SWPA/Existing

Description/Title: General Plan Update and Digital User Platform

Contract:  Agreement:  Lease/Rent:  Amendment:

Term Start Date: When Signed Term End Date: 6/30/2028 Total Contract Amount: \$1,887,871.87

Approved by Council (If over the City Manager's approval threshold, you must go through GB) \_\_\_\_\_

Contract / Lease: Contract (Initial Approval)

1.b Amendment #: N/A to the Original Contract/Lease # \_\_\_\_\_

Increase/(Decrease) Amount \$: N/A

Extend Expiration Date to: N/A

Approved by Council (If the original went through GB, all amendments must go through GB regardless of the amendment reason) Date: \_\_\_\_\_

Amendment is for: N/A

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

This is an initial contract approval request for the update of the General Plan and creation of a digi

### 3. Procurement History:

Purchasing Officer Review: \_\_\_\_\_ Date: May 21, 2024  
Comment & Exceptions: 13-1-112. Competitive sealed proposals; request for proposals.

### 4. Funding Source: General Fund Org / Object: 1004501/510300

Andy Hopkins Budget Officer Approval: \_\_\_\_\_ Date: May 21, 2024  
Comment & Exceptions: \_\_\_\_\_

### 5. Grant History (if applicable): N/A

Grants Administrator Approval: \_\_\_\_\_ Date: \_\_\_\_\_

Staff Contact who Completed This Form: Heather Lamboy Phone #: 505-470-5281

To be recorded by City Clerk: \_\_\_\_\_ Email: hllamboy@santafenm.gov

Clerk # \_\_\_\_\_  
Date of Execution: \_\_\_\_\_

ITT Representative (attesting that all information is reviewed) \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

**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 **WSP USA Inc**, 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 facilitate a comprehensive review and revision of the City of Santa Fe’s General Plan. The Contractor shall provide the following services-for the City:

In response to RFP#24/20/P (Contract Exhibit 1), the Contractor proposes an alternative work plan and modified process intended to provide an accelerated project timeline. The alternate process provided in the Contractor’s Technical Proposal (Contract Exhibit 2) and Cost Proposal (Contract Exhibit 3) shall encompass all requested elements and shall be inclusive of services and work product deliverables detailed in the scope of work set forth in RFP #24/20/P.

The Contractor shall provide the following services, further described in the Contractor’s Technical Proposal (Contract Exhibit 2) attached hereto, to the City as represented in their proposal to the City in response to RFP #24/20/P.

STEP 1 – Mobilization and Understanding  
Approximately 9 months

Scope of work and deliverables:

1. Kickoff meeting and materials
2. Project management plan
3. Project SharePoint site

4. Digital User Platform development: Launch Phase
5. Social Pinpoint Hub or other equivalent online civic engagement tool
6. Project communications brand, identity, supporting materials, and templates
7. Public Engagement Plan, inclusive of CHART and Midtown outreach considerations
8. Open house plans and materials, Community Conversation Kits, and other supporting public engagement materials in English and Spanish
9. Governance model
10. Administrative draft, public review draft and final assessment report completed in two phases. **Phase 1** will document the analysis of existing conditions and trends. The draft report will be published on the project website for public comments and recommendations. **Phase 2** will incorporate the public engagement findings and the City's short-term and long-term needs and desires

#### STEP 2 – Vision and Goals

Approximately 6 months

##### Scope of works and deliverables:

1. Public communications and engagement materials
2. Internal project team charrette to develop vision and goals
3. Administrative draft, public review draft and final vision statement
4. Administrative draft, public review draft and final goals
5. Place-type initial groups cross referenced to City's Land Development Code (LDC)
6. Digital User Platform development: Phase 2

#### STEP 3 – Scenario Planning

Approximately 6 months

##### Scope of work and deliverables:

1. Public communications and engagement materials
2. Scenario planning internal project team charrette
3. Place-type categories within each group identified in Step 2 coordinated with LDC
4. Six discussion draft scenario ideas for internal project team charrette
5. Three thematic, conceptual level scenarios with one-page briefer for each with characterization and comparative analysis: administrative review, public draft review and final
6. Digital User Platform development: Phase 3

#### STEP 4 – Development of Preferred Plan

Approximately 6 months

##### Scope of work and deliverables:

1. Administrative draft, public review draft and final General Plan document with appendices
2. Public communications and engagement materials
3. General Plan document outlining internal project team charrette

4. Complete draft of place-types categories within each group, coordinated with LDC
5. Digital User Platform development: Phase 4

#### **STEP 5 – Work Program and Funding Plan**

Approximately 3 Months

##### **Scope of work and deliverables:**

1. Internal project team charrette to outline the General Plan document
2. Public communications and engagement materials
3. Administrative governance policy and procedure
4. Administrative draft, public review draft and final implementation work program
5. Equitable project development and delivery guidelines
6. Digital User Platform development: Phase 5

#### **STEP FORWARD - Governing Body Action & Implementation and Evaluation**

Approximately 3 Months

##### **Scope of work and deliverables:**

1. Public communications and engagement materials
2. Internal charrette to prepare for final action on General Plan and preparatory implementation steps
3. One decision-maker briefing PowerPoint presentation for City staff to use in briefing decision-makers
4. One Planning Commission hearing and presentation
5. One Governing Body hearing and presentation
6. Digital User Platform development: Phase 6

#### **STEP ONGOING - Administrative Coordination + Engagement and Communication**

##### **Scope of work and deliverables:**

1. Biweekly team agenda and notes
2. Quarterly LDC update team agenda and notes
3. Monthly e-newsletter
4. Periodic social media posts
5. PowerPoint presentations for periodic Planning Commission and Governing body updates conducted by City staff, including Step stage gates
6. Monthly progress reports and invoices

**Crosswalk illustrating Alternative Proposed Work Plan as compared to the RFP Scope of Work:**

| Table 1: Proposed Work Plan Steps  | CY2024 |    |    | CY2025 |    |    | CY2026 |    |    |    |    |
|--|--------|----|----|--------|----|----|--------|----|----|----|----|
|  | Q2     | Q3 | Q4 | Q1     | Q2 | Q3 | Q4     | Q1 | Q2 | Q3 | Q4 |
| STEP 1<br>Mobilization and Understanding                                     |        |    |    |        |    |    |        |    |    |    |    |
| STEP 2<br>Vision and Goals   |        |    |    |        |    |    |        |    |    |    |    |
| STEP 3<br>Scenario Planning  |        |    |    |        |    |    |        |    |    |    |    |
| STEP 4<br>Development of Preferred Plan                                      |        |    |    |        |    |    |        |    |    |    |    |
| STEP 5<br>Work Program and Funding Plan                                      |        |    |    |        |    |    |        |    |    |    |    |
| STEP → FORWARD<br>Governing Body Action + Implementation and Evaluation      |        |    |    |        |    |    |        |    |    |    |    |
| STEP ↻ ONGOING<br>Administrative Coordination + Engagement and Communication |        |    |    |        |    |    |        |    |    |    |    |

| Table 2: Crosswalk to RFP Work Plan  | Phase 1                                  | Phase 2                    | Phase 3            |
|--|--|----------------------------|--------------------|
|  | STEP 1<br>Mobilization and Understanding | Task 1<br>Task 2<br>Task 3 | Task 4<br>Task 5   |
| STEP 2<br>Vision and Goals   |  |                            | Task 7             |
| STEP 3<br>Scenario Planning  |  |                            | Task 6             |
| STEP 4<br>Development of Preferred Plan                                      |  |                            | Task 7             |
| STEP 5<br>Work Program and Funding Plan                                      |  |                            | Task 8             |
| STEP → FORWARD<br>Governing Body Action + Implementation and Evaluation      |  |                            | Task 9             |
| STEP ↻ ONGOING<br>Administrative Coordination + Engagement and Communication | Task 1                                   | Task 1 +<br>Task 4         | Task 1 +<br>Task 4 |

**2. Standard of Performance; Licenses**

A. The Contractor does hereby accept its designation as a professional service, rendering services related to the General Plan Update 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 deliverables detailed above, such compensation not to exceed ONE MILLION, SEVEN HUNDRED FORTY-FIVE THOUSAND DOLLARS (\$1,745,000), excluding gross receipts tax. The New Mexico gross receipts tax levied on the amounts payable under this Contract totaling ONE HUNDRED FORTY-TWO THOUSAND, EIGHT HUNDRED SEVENTY-ONE DOLLARS and EIGHTY-SEVEN CENTS (\$142,871.87) shall be paid by the City to the Contractor. The total amount payable to the Contractor under this Contract, including gross receipts tax and expenses, shall not exceed ONE MILLION, EIGHT HUNDRED EIGHTY-SEVEN THOUSAND, EIGHT HUNDRED SEVENTY-ONE DOLLARS and EIGHTY-SEVEN CENTS (\$1,887,871.87). This amount is a maximum and not a guarantee that the work assigned to be performed by Contractor under this

Contract 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 Contract 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 Contract being amended in writing prior to those services in excess of the total compensation amount being provided.

Contractor's Cost Proposal (Contract Exhibit 3) outlines annual funding required to adhere to the project schedule (Proposed Work Plan Steps) presented in the Technical Proposal (Contract Exhibit 2).

B. Payment is subject to availability of funds pursuant to the Appropriations Paragraph set forth below and to any negotiations between the parties from year to year pursuant to Paragraph 1, Scope of Work, and to approval by the City. All invoices MUST BE received by the City no later than thirty (30) days after the termination of the Fiscal Year in which the services were delivered. Invoices received after such date WILL NOT BE PAID.

C. Payment in future fiscal years is subject to availability of funds pursuant to the Appropriations Paragraph set forth below and to any negotiations between the parties from year to year pursuant to Paragraph 1, Scope of Work, and to approval by the City. All invoices MUST BE received by the City no later than fifteen (15) days after the termination of the Fiscal Year in which the services were delivered. Invoices received after such date WILL NOT BE PAID.)

D. Contractor must submit a detailed statement accounting for all services performed and expenses incurred. If the City finds that the services are not acceptable, within thirty days after the date of receipt of written notice from the Contractor that payment is requested, it shall provide the Contractor a letter of exception explaining the defect or objection to the services, and outlining steps the Contractor may take to provide remedial action. Upon certification by the City that the services have been received and accepted, payment shall be tendered to the Contractor within thirty days after the date of acceptance. If payment is made by mail, the payment shall be deemed tendered on the date it is postmarked.

E. If the City fails to pay the contractor within twenty-one days after receipt of an undisputed request for payment, the City shall pay interest to the contractor beginning on the twenty-second day after payment was due, computed at one and one-half percent of the undisputed amount per month or fraction of a month until the payment is issued. If the City receives an improperly completed invoice, the City shall notify the sender of the invoice within seven days of receipt in what way the invoice is improperly completed, and the owner has no further duty to pay on the improperly completed invoice until it is resubmitted as complete.

**F. 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), or 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 payment 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 #24/20/P 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 as broad as ISO Form CG 00 01 with limits not less than \$2,000,000 per occurrence and \$2,000,000 in the aggregate for claims against bodily injury, personal and advertising injury, and property damage. Said policy shall include broad form Contractual Liability coverage and be endorsed to name the City of Santa Fe their officials, officers, employees, and agents as additional insureds.

B. **Broader Coverage and Limits.** The insurance requirements under this 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: Heather Lamboy, Procurement Manager, City of Santa Fe  
200 Lincoln Ave, Box 909  
Santa Fe, NM 87504-0909  
[hllamboy@santafenm.gov](mailto:hllamboy@santafenm.gov)

To the Contractor: WSP USA Inc.  
Daniel Sims, Senior Vice President  
2440 Louisiana Blvd NE, Suite 400  
Albuquerque, NM 87110  
[dan.sims@wsp.com](mailto:dan.sims@wsp.com)

### **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:

  
Alan Webber (May 31, 2024 15:46 MDT)

ALAN WEBBER, MAYOR

CONTRACTOR:

WSP, USA Inc  
  
Matthew Sibul (May 17, 2024 11:21 MDT)

MATT SIBUL

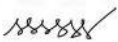
DATE: May 17, 2024

TITLE: SENIOR VICE PRESIDENT

CRS#: 01-195458-002

Registration #: 230545

ATTEST:



GERALYN CARDENAS, INTERIM CITY CLERK  
XIV

CITY ATTORNEY'S OFFICE:



May 17, 2024

REBECCA MNUK-HERRMANN, ASSISTANT CITY ATTORNEY

APPROVED FOR FINANCES:



FINANCE DIRECTOR, EMILY OSTER

**City of Santa Fe  
Planning and Land Use Department**

**REQUEST FOR PROPOSALS (RFP)**

**General Plan Update**



**RFP#  
24/20/P**

RFP Release Date: October 18, 2023

Proposals Due Date: November 28, 2023

**ELECTRONIC-ONLY PROPOSAL SUBMISSION**

# Contents

|  |           |
|--|-----------|
| <b>I. INTRODUCTION.....</b>  | <b>5</b>  |
| A. <i>PURPOSE OF THIS REQUEST FOR PROPOSALS</i> .....              | 5         |
| B. <i>BACKGROUND INFORMATION</i> .....                             | 5         |
| C. <i>SCOPE OF PROCUREMENT</i> .....                               | 7         |
| D. <i>PROCUREMENT MANAGER</i> .....                                | 7         |
| E. <i>PROPOSAL SUBMISSION</i> .....                                | 8         |
| F. <i>DEFINITION OF TERMINOLOGY</i> .....                          | 8         |
| G. <i>PROCUREMENT LIBRARY</i> .....                                | 11        |
| <b>II. CONDITIONS GOVERNING THE PROCUREMENT .....</b>              | <b>13</b> |
| A. <i>SEQUENCE OF EVENTS</i> .....                                 | 13        |
| B. <i>EXPLANATION OF EVENTS</i> .....                              | 13        |
| 1. <i>Issue RFP</i> .....  | 13        |
| 2. <i>Acknowledgement of Receipt Form</i> .....                    | 14        |
| 3. <i>Pre-Proposal Conference</i> .....                            | 14        |
| 4. <i>Deadline to Submit Written Questions</i> .....               | 14        |
| 5. <i>Response to Written Questions</i> .....                      | 15        |
| 6. <i>Submission of Proposal</i> .....                             | 15        |
| 7. <i>Proposal Evaluation</i> .....                                | 15        |
| 8. <i>Selection of Finalists</i> .....                             | 15        |
| 9. <i>Oral Presentations</i> .....                                 | 16        |
| 10. <i>Finalize Contractual Agreements</i> .....                   | 16        |
| 11. <i>Contract Awards</i> .....                                   | 16        |
| 12. <i>Protest Deadline</i> .....                                  | 16        |
| C. <i>GENERAL REQUIREMENTS</i> .....                               | 17        |
| 1. <i>Acceptance of Conditions Governing the Procurement</i> ..... | 17        |
| 2. <i>Incurring Cost</i> .....                                     | 17        |
| 3. <i>Prime Contractor Responsibility</i> .....                    | 17        |
| 4. <i>Subcontractors/Consent</i> .....                             | 17        |
| 5. <i>Amended Proposals</i> .....                                  | 17        |
| 6. <i>Offeror's Rights to Withdraw Proposal</i> .....              | 17        |
| 7. <i>Proposal Offer Firm</i> .....                                | 18        |
| 8. <i>Disclosure of Proposal Contents</i> .....                    | 18        |
| 9. <i>No Obligation</i> .....                                      | 18        |
| 10. <i>Termination</i> .....                                       | 18        |
| 11. <i>Sufficient Appropriation</i> .....                          | 18        |
| 12. <i>Legal Review</i> .....                                      | 19        |
| 13. <i>Governing Law</i> .....                                     | 19        |
| 14. <i>Basis for Proposal</i> .....                                | 19        |
| 15. <i>Contract Terms and Conditions</i> .....                     | 19        |
| 16. <i>Offeror's Terms and Conditions</i> .....                    | 20        |
| 17. <i>Contract Deviations</i> .....                               | 20        |
| 18. <i>Offeror Qualifications</i> .....                            | 20        |
| 19. <i>Right to Waive Minor Irregularities</i> .....               | 20        |
| 20. <i>Change in Contractor Representatives</i> .....              | 20        |
| 21. <i>Notice of Penalties</i> .....                               | 20        |
| 22. <i>Department Rights</i> .....                                 | 20        |
| 23. <i>Right to Publish</i> .....                                  | 21        |
| 24. <i>Ownership of Proposals</i> .....                            | 21        |
| 25. <i>Confidentiality</i> .....                                   | 21        |

|  |  |           |
|--|--|-----------|
| 26.  | <i>Electronic mail address required</i> .....                        | 21        |
| 27.  | <i>Use of Electronic Versions of this RFP</i> .....                  | 21        |
| 28.  | <i>Campaign Contribution Disclosure Form</i> .....                   | 21        |
| 29.  | <i>Letter of Transmittal</i> .....                                   | 21        |
| 30.  | <i>Disclosure Regarding Responsibility</i> .....                     | 22        |
| 31.  | <i>Local Preferences</i> .....                                       | 24        |
| 32.  | <i>Living Wage</i> .....   | 25        |
| <b>III. RESPONSE FORMAT AND ORGANIZATION</b> ..... |  | <b>25</b> |
| A.   | NUMBER OF RESPONSES .....  | 25        |
| B.   | NUMBER OF COPIES .....   | 25        |
| 1.   | <i>ELECTRONIC SUBMISSION ONLY Responses</i> .....                    | 25        |
| C.   | PROPOSAL FORMAT .....  | 26        |
| 1.   | <i>Proposal Content and Organization</i> .....                       | 26        |
| <b>IV. SPECIFICATIONS</b> .....                    |  | <b>28</b> |
| A.   | GOALS.....   | 28        |
| B.   | OBJECTIVES.....  | 29        |
| C.   | ASSUMPTIONS.....   | 29        |
| D.   | DETAILED SCOPE OF WORK .....   | 30        |
| B.   | TECHNICAL SPECIFICATIONS.....  | 35        |
| 1.   | <i>Organizational Experience</i> .....                               | 35        |
| 2.   | <i>Mandatory Specification</i> .....                                 | 35        |
| 3.   | <i>Desirable Specification</i> .....                                 | 36        |
| C.   | BUSINESS SPECIFICATIONS .....  | 36        |
| 1.   | <i>Letter of Transmittal Form</i> .....                              | 36        |
| 2.   | <i>Campaign Contribution Disclosure Form</i> .....                   | 36        |
| 3.   | <i>Oral Presentation</i> .....                                       | 37        |
| 4.   | <i>Cost</i> .....  | 37        |
| 5.   | <i>Local Preference</i> .....  | 37        |
| <b>V. EVALUATION</b> .....                         |  | <b>38</b> |
| A.   | EVALUATION POINT SUMMARY .....                                       | 38        |
| B.   | EVALUATION FACTORS .....   | 38        |
| 1.   | <i>B.1 Organizational Experience (See Table 1)</i> .....             | 38        |
| 3.   | <i>B.3 Desirable Specifications</i> .....                            | 38        |
| 4.   | <i>C.1 Letter of Transmittal (See Table 1)</i> .....                 | 39        |
| 5.   | <i>C.2 Campaign Contribution Disclosure Form (See Table 1)</i> ..... | 39        |
| 6.   | <i>C.3 Oral Presentation (See Table 1)</i> .....                     | 39        |
| 7.   | <i>C.4 Cost (See Table 1)</i> .....                                  | 39        |
| 8.   | <i>C.5. Local Preferences</i> .....                                  | 39        |
| C.   | EVALUATION PROCESS .....   | 40        |
| <b>APPENDIX A</b> .....                            |  | <b>41</b> |
|  | ACKNOWLEDGEMENT OF RECEIPT FORM .....                                | 41        |
| <b>APPENDIX B</b> .....                            |  | <b>43</b> |
|  | CAMPAIGN CONTRIBUTION DISCLOSURE FORM .....                          | 43        |
| <b>APPENDIX C</b> .....                            |  | <b>47</b> |
|  | COST RESPONSE FORM .....   | 47        |
| <b>APPENDIX D</b> .....                            |  | <b>49</b> |

LETTER OF TRANSMITTAL FORM .....49

**APPENDIX E ..... 51**

NON-COLLUSION AFFIDAVIT .....51

**APPENDIX F ..... 53**

CONFLICT OF INTEREST .....53

**APPENDIX G ..... 56**

DRAFT CONTRACT .....56

# **I. INTRODUCTION**

## **A. PURPOSE OF THIS REQUEST FOR PROPOSALS**

The purpose of the Request for Proposals (RFP) is to solicit sealed proposals to establish a contract through competitive negotiations for a Land Use Planning Consultant to facilitate a comprehensive review and revision of the City of Santa Fe's (City) General Plan. New Mexico Statute refers to this plan as a "Master Plan" and other government entities refer to it as "comprehensive" plan or "master" plan.

## **B. BACKGROUND INFORMATION**

The City of Santa Fe enjoys a long history as a municipality and in prior eras spanning from settlement by the first Indigenous populations (whose descendants still call it Oga Po'geh, White Shell Water Place), and followed by the Spanish Influence beginning in the 1500's and American influence from the 1900's to modern times. Modern planning efforts began in Santa Fe in 1946, with the adoption of the "City Plan" prepared by Harland Bartholomew and Associates.

First adopted in 1972, and subsequently updated in 1983 and 1999, The General Plan is the City of Santa Fe's policy guide for land development, planning and growth objectives, related implementation strategies, and the administration of the Land Development Code. It serves as the statement of goals, recommendations and policy guidance for the development of the physical environment of Santa Fe and other geographic areas in Santa Fe's region. The General Plan will serve as a basis for land development approvals and other land and planning related implementation programs within the City. The goals, vision, implementation policies and work programs, and policy guidance of the General Plan may be amended from time to time to meet the changing requirements of the City.

The General Plan guides the comprehensive, long-range plan for the development and responsible stewardship of Santa Fe's resources. It is a critical tool for priority identification and decision making. It provides a policy framework for development proposals, capital improvements, annexation, and extension of public services. It represents the vision of the Santa Fe community and should be recognized as the City's foremost commitment to Santa Fe's future growth and redevelopment objectives. It outlines a vision through various themes that reflect the aspirations of the community and establishes a basis for review of development proposals and public projects to ensure that they are consistent with policy objectives. It provides for strategies that will enhance the character of the community and preserve critical environmental and historic resources and minimize potential hazards. It provides the basis for establishing and setting priorities for implementing programs and regulations and provides the basis for nurturing a vital community and assuring input from all segments of the population.

The General Plan's last comprehensive update was adopted in 1999, after several years of community engagement, analysis and drafting. The 1999 General Plan, along with the Future Land Use Map, continues to be the presiding document which guides city planning and land use policy and review of new development proposals. While many of the themes in the 1999 General Plan remain relevant for

contemporary planning, the data and analysis in 1999 General Plan have not been updated to reflect contemporary circumstances in Santa Fe and the shifting priorities of the world at large, it is no longer directly tied to the City's Capital Improvements Plans and does not incorporate plans adopted since 1999.

Due to these circumstances, the City is endeavoring to revise the General Plan to reflect current conditions and respond to contemporary issues such as climate change, housing affordability, and social equity. The General Plan Update should acknowledge and honor relevant components of the existing 1999 General Plan while recognizing contemporary challenges and opportunities. The revision should identify economic, demographic and environmental changes in Santa Fe in the years since the 1999 General Plan was adopted. It should then identify both the short-term and long-term needs and desires of the community and provide a strategic framework for addressing those needs in a responsible and equitable way.

The General Plan Update will be conducted concurrently with the Land Development Code (LDC) Update project, Phase 1 of which is already underway. The LDC Update is a multi-phase project led by the Land Use and Planning Department in collaboration with Clarion Associates, a consulting firm that specializes in ordinance development and plan implementation, to restructure and update the City's Land Development Code.

Phase 1 of the project is focused on identifying issues with the code and recommending non-substantive amendments to the code's organization and text that will make the code easier to understand and administer. Phase 2 of the project is focused on more substantive changes including LDC's procedures, regulations, and zoning districts. Finally, Phase 3 of the project focuses on adding additional substantive revisions to implement the land use and growth goals and policies of the updated Santa Fe General Plan identified by General Plan Update project. The General Plan Update consultant is expected to collaborate with the Land Development Code update project team across all three phases, but particularly in Phase 3, where the code will be amended to reflect the goals and policies identified in the General Plan update project. The full Land Development Code project scope is provided in the Procurement Library (Section I.G.).

In addition to the LDC update, the following planning activities are ongoing and will need to be included in the Plan update:

1. Culture, History, Art, Reconciliation and Truth (CHART): an extensive public engagement effort initiated in response to the period of civil unrest in 2020.
2. Santa Fe Water 2100: a 100-year water resource plan currently being drafted by the City's Water Division.
3. Midtown District Redevelopment: A major City-led redevelopment project of the former College of Santa Fe campus. A master plan has been completed and RFP's have been issued for development proposals.
4. Complete Streets Engineering Handbook: An effort led by the Public Works Department to update the City's Street design and engineering standards and move them from the Land Development Code to an Engineering Handbook managed by Public Works.
5. Bicycle and Multimodal Master Plans Update: An effort led by the Santa Fe Metropolitan Planning Organization to update the existing Bicycle and Multimodal Master Plans.

The General Plan Update consultant is expected to collaborate with the project teams and incorporate the findings from these ongoing planning efforts into the goals and objectives identified as part of the update project.

### **C. SCOPE OF PROCUREMENT**

This RFP is to solicit the procurement of a qualified Land Use and Planning Consultant to facilitate a comprehensive review and revision of the City of Santa Fe's (City) General Plan. The Consultant Services may include, but are not limited to, administrative coordination and support, public engagement, land use planning analysis and recommendations delivered in a variety of formats including reports, maps, digital and paper publications. The Consultant Team may include subcontractors, community organizations and other relevant members needed to perform the required tasks.

Tasks and Phases are meant to provide guidance on structure and schedule of deliverables but may change due to circumstances including but not limited to Land Development Code Rewrite progression, Consultant recommendations or other circumstances.

The Tasks and Phases listed in Section IV. Scope of Work are intended to include the entire General Plan Update project, however only Phase 1 is currently funded. The subsequent Phases 2 and 3 will be undertaken as funding becomes available in subsequent fiscal years.

### **PROJECT TERM**

The project procurement will be for four (4) years.

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 Planning and Land Use Department 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: Heather Lamboy, Assistant Director of Planning and Land Use, Procurement  
Manager

Telephone: (505) 955-6598

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

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

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

Offerors may contact **ONLY** the Procurement Manager and the Central Purchasing Office regarding this procurement. Other city employees or Evaluation Committee members do not have the authority to respond on behalf of the Procurement Manager.

2. **Protests of the solicitation or award must be submitted in writing to the Protest Manager identified in Section II.B.12.** As a Protest Manager has been named in this Request for Proposals, pursuant to NMSA 1978, §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. 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://cityofsantafenm.sharefile.com/r-r6a199d2a98094545a0fc75efdb971f9b>

## F. DEFINITION OF TERMINOLOGY

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

1. **“Authorized Purchaser”** means an individual authorized by a Participating Entity to place orders against this contract.
2. **“Award”** means the final execution of the contract document.
3. **“Business Hours”** means 8:00 AM thru 5:00 PM MST/MDT, whichever is in effect on the date given.
4. **“Central Purchasing Office”** means the office responsible for the control of procurement of items of tangible personal property, services, or construction.
5. **“Chief Procurement Officer”** means that person within the Central Purchasing Office who is responsible for the control of procurement of items of tangible personal property, services, or construction.
6. **“City”** means the City of Santa Fe, New Mexico which in the procurement context may act through the Finance Director, City Manager, or Governing Body.
7. **“Close of Business”** means 5:00 PM Mountain Standard or Daylight Time, whichever is in use at that time.
8. **“Confidential”** means confidential financial information concerning Offeror’s organization and data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act

NMSA 1978, §§57-3-A-1 through 57-3A-7. The following items may **not** be labelled as confidential: Offeror's submitted Cost response, Staff/Personnel Resumes/Bios (excluding personal information such as personal telephone numbers and/or home addresses), and other submitted data that is **not** confidential financial information or that qualifies under the Uniform Trade Secrets Act.

9. **"Contract"** means any agreement for the procurement of items of tangible personal property, services, or construction.
10. **"Contractor"** means any business having a contract with the City of Santa Fe.
11. **"Department"** means the Requesting Department sponsoring this Procurement.
12. **"Determination"** means the written documentation of a decision of a procurement officer including findings of fact required to support a decision. A determination becomes part of the procurement file to which it pertains.
13. **"Desirable"** – the terms "may," "can," "should," "preferably," or "prefers" identify a desirable or discretionary item or factor.
14. **"Electronic Submission"** means a successful submittal of Offeror's proposal.
15. **"Electronic Version/Copy"** means a digital form consisting of text, images or both that are readable on computers or other electronic devices. The electronic version/copy can only be uploaded to ShareFile.
16. **"Evaluation Committee"** means a body appointed to perform the evaluation of Offerors' proposals.
17. **"Evaluation Committee Report"** means a report prepared by the Procurement Manager and the Evaluation Committee to support the Committee's recommendation for contract award. It will contain scores and written evaluations of all responsive Offeror proposals.
18. **"Final Award"** means, in the context of this Request for Proposals and all its attendant documents, that point at which the final required signature on the contract(s) resulting from the procurement has been affixed to the contract(s) thus making it fully executed.
19. **"Finalist"** means an Offeror who meets all the mandatory specifications of this Request for Proposals and whose score on evaluation factors is sufficiently high to merit further consideration by the Evaluation Committee.
20. **"General Plan"** means the adopted policy guide and program development for the City of Santa Fe, synonymous with a City "Comprehensive Plan" or "Master Plan."

21. **“Hourly Rate”** means the proposed fully loaded maximum hourly rates that include travel, per diem, fringe benefits and any overhead costs for contractor personnel, as well as subcontractor personnel if appropriate.
22. **“IT”** means Information Technology.
23. **“Living Wage”** means the City’s minimum hourly wage necessary for a person to achieve a higher standard of living.
24. **“Land Development Code”** means the Santa Fe Code of Ordinances chapters that regulates all development activity within the City limits. Also known as “Chapter 14”.
25. **“Mandatory”** – the terms “must,” “shall” “will,” “is required,” or “are required,” identify a mandatory item or factor. Failure to meet a mandatory item or factor may result in the rejection of the Offeror’s proposal.
26. **“Minor Irregularities”** means anything in the proposal that does not affect the price, quality and/or quantity, or any other mandatory requirement.
27. **“Offeror”** is any person, corporation, or partnership who chooses to submit a proposal.
28. **“Procurement Manager”** means any person or designee authorized by the Requesting Department to facilitate the procurement and or administer the contract(s).
29. **“Project”** means a temporary process undertaken to solve a well-defined goal or objective with clearly defined start and end times, a set of clearly defined tasks, and a budget. The project terminates once the project scope is achieved, and project acceptance is given by the project executive sponsor.
30. **“Redacted”** means a version/copy of the Offeror’s proposal with the information considered proprietary or confidential (as defined by NMSA 1978, §§ 57-3A-1 to 57-3A-7 and summarized herein and outlined in Section II.C.8 of this RFP) blacked-out BUT NOT omitted or removed.
31. **“Request for Proposals (RFP)”** means all documents, including those attached or incorporated by reference, used for soliciting proposals.
32. **“Requesting Department”** means the City Department responsible for overseeing the work or delivery of tangible personal property by a contractor.
33. **“Responsible Offeror”** means an Offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that his financial resources, production or service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services, or items of tangible personal property described in the proposal.

34. **“Responsive Offer”** or means an offer which conforms in all material respects to the requirements set forth in the request for proposals. Material respects of a request for proposals include, but are not limited to price, quality, quantity, or delivery requirements.
35. **“Sealed”** means, in terms of a non-electronic submission, that the proposal is enclosed in a package which is completely fastened in such a way that nothing can be added or removed. Open packages submitted will not be accepted except for packages that may have been damaged by the delivery service itself. The City of Santa Fe reserves the right, however, to accept or reject packages where there may have been damage done by the delivery service itself. Whether a package has been damaged by the delivery service or left unfastened and should or should not be accepted is a determination to be made by the City’s Chief Procurement Officer. By submitting a proposal, the Offeror agrees to and concurs with this process and accepts the determination of the Chief Procurement Officer in such cases.
36. **“Staff”** means any individual who is a full-time, part-time, or an independently contracted employee with the Offerors’ company.
37. **“State (the State)”** means the State of New Mexico.
38. **“Statement of Concurrence”** means an affirmative statement from the Offeror to the required specification agreeing to comply and concur with the stated requirement(s). This statement shall be included in Offerors proposal. (E.g., “We concur,” “Understands and Complies,” “Comply,” “Will Comply if Applicable.”)
39. **“Unredacted”** means a version/copy of the proposal containing all complete information; including any that the Offeror would otherwise consider confidential, such copy for use only for the purposes of evaluation.
40. **“Written”** means typewritten on standard 8 ½ x 11-inch paper. Larger paper is permissible for charts, spreadsheets, etc.

## **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://www.santafenm.gov/bids\\_rfps](https://www.santafenm.gov/bids_rfps)

Other relevant links:

[Resolution Adopting Next Steps to Revise the City of Santa Fe’s General Plan](#)

[City of Santa Fe General Plan \(1999\)](#)

[City of Santa Fe Long-Range Planning webpage](#)

[City of Santa Fe Land Development Code](#)

[City of Santa Fe Land Development Code Update Project Website](#)

[City of Santa FE Land Development Code Update Contract and Scope](#)

[City of Santa Fe Complete Streets Resolution](#)

## 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 Office and the Procurement Manager will make every effort to adhere to the following schedule:

| Action                                  | Responsible Party                        | Due Dates                |
|---|--|--------------------------|
| 1. Issue RFP                            | Central Purchasing Office                | October 18, 2023         |
| 2. Acknowledgement of Receipt Form      | Potential Offerors                       | November 1, 2023         |
| 3. Pre-Proposal Conference              | Requesting Department                    | November 1, 2023         |
| 4. Deadline to submit Written Questions | Potential Offerors                       | November 3, 2023         |
| 5. Response to Written Questions        | Procurement Manager                      | November 10, 2023        |
| <b>6. Submission of Proposal</b>        | <b>Potential Offerors</b>                | <b>November 28, 2023</b> |
| 7.* Proposal Evaluation                 | Evaluation Committee                     | November 29, 2023        |
| 8.* Selection of Finalists              | Evaluation Committee                     | December 12, 2023        |
| 10.* Oral Presentation(s)               | Finalist Offerors                        | January 8, 2024          |
| 11.* Finalize Contractual Agreements    | Requesting Department/Finalist Offerors  | January 16, 2024         |
| 12.* Contract Awards                    | Requesting Department/ Finalist Offerors | February 29, 2024        |
| 13.* Protest Deadline                   | Central Purchasing Office                | +15 days                 |

\*Dates indicated in Events 7 through 13 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 shown in Section II.A., above.

#### 1. Issue RFP

This RFP is being issued on behalf of The City Planning and Land Use Department on the date indicated in Section II.A, Sequence of Events.

## 2. Acknowledgement of Receipt Form

Potential Offerors may email the Acknowledgement of Receipt Form (APPENDIX A), to the Central Purchasing Office at [Purchasing\\_RFP@santafenm.gov](mailto:Purchasing_RFP@santafenm.gov), to have their organization placed on the procurement Distribution List. The form must be returned to the Central Purchasing Office by 3:00 pm MST/ MDT on the date indicated in Section II.A, Sequence of Events

The procurement distribution list will be used for the distribution of written responses to questions, and/or any amendments to the RFP. Failure to return the Acknowledgement of Receipt Form does not prohibit potential Offerors from submitting a response to this RFP. However, by not returning the Acknowledgement of Receipt Form, the potential Offeror's representative shall not be included on the distribution list and will be solely responsible for obtaining from the Procurement Library (Section I.G.) responses to written questions and any amendments to the RFP.

## 3. Pre-Proposal Conference

A pre-proposal conference will be held as indicated in Section II.A, Sequence of Events, beginning at 1:30 P.M. MST/MDT via Microsoft Teams.

### Microsoft Teams meeting

Join on your computer, mobile app or room device

[Click here to join the meeting](#)

Meeting ID: 241 333 958 126

Passcode: coJLAE

[Download Teams](#) | [Join on the web](#)

[Learn More](#) | [Meeting options](#)

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

Attendance at the pre-proposal conference is highly recommended, but not a prerequisite for submission of a proposal.

## 4. Deadline to Submit Written Questions

Potential Offerors may submit written questions to the Central Purchasing Office and the Procurement Manager as to the intent or clarity of this RFP until 3:00 pm MST/MDT as indicated in Section II.A, Sequence of Events. All written questions must be addressed to the Central Purchasing Office and the Procurement Manager as declared in Section I.D.

Questions shall be clearly labeled and shall cite the Section(s) in the RFP or other document which form the basis of the question.

## 5. Response to Written Questions

Written responses to the written questions will be provided via email, on or before the date indicated in Section II.A, Sequence of Events, to all potential Offerors who timely submitted an Acknowledgement of Receipt Form (Section II.B.2 and APPENDIX A).

An electronic version of the Questions and Answers will be posted to:  
[https://www.santafenm.gov/bids\\_rfps](https://www.santafenm.gov/bids_rfps)

## 6. Submission of Proposal

**At this time, only electronic proposal submission is allowed. Do not submit hard copies until further notice.**

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

<https://cityofsantafenm.sharefile.com/r-r6a199d2a98094545a0fc75efdb971f9b>

NO LATER THAN **3:00 PM** MST/MDT ON THE DATE INDICATED IN SECTION II.A, SEQUENCE OF EVENTS. **PROPOSALS RECEIVED AFTER THIS**

**DEADLINE WILL NOT BE ACCEPTED.** The date and time of receipt will be recorded on each proposal.

***Proposals must be submitted electronically through the link in Section III.B.1.*** Proposals submitted by facsimile will not be accepted.

A log will be kept of the names of all Offeror organizations that submitted proposals. Pursuant to NMSA 1978, § 13-1-116, the contents of proposals shall not be disclosed to competing potential 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 the final required City of Santa Fe signatures on the contract(s) resulting from the procurement has been obtained.

## 7. Proposal Evaluation

An Evaluation Committee will perform the evaluation of proposals. This process will take place as indicated in Section II.A, Sequence of Events, depending upon the number of proposals received. During this time, the Central Purchasing Office or/and the Procurement Manager may initiate discussions with Offerors who submit responsive or potentially responsive proposals for the purpose of clarifying aspects of the proposals. However, proposals may be accepted and evaluated without such discussion. Discussions SHALL NOT be initiated by the Offerors.

## 8. Selection of Finalists

The Evaluation Committee will select, and the Procurement Manager will notify the finalist Offerors as per schedule Section II.A, Sequence of Events or as soon as possible thereafter. A schedule for Oral Presentation, if any, will be determined at this time.

Finalists will be comprised of the three (3) Offerors receiving the highest cumulative scores in the following Sections: Section IV.B.1 Organizational Experience, Section IV.B.2 Mandatory Specifications and Section IV.B.3.

## **9. Oral Presentations**

Finalist Offerors, as selected per Section II.B.9 above, may be required to conduct an oral presentation at a venue to be determined as per schedule Section II.A., Sequence of Events, or as soon as possible thereafter. If oral presentations are held, Finalist Offerors may make their presentations through electronic means (GoToMeeting, Zoom, etc.) or in person. The Department will provide Finalist Offerors with applicable details. Whether or not Oral Presentations will be held is at the discretion of the Evaluation Committee and Central Purchasing Office.

## **10. Finalize Contractual Agreements**

After approval of the Evaluation Committee Report, any contractual agreement(s) resulting from this RFP will be finalized with the most advantageous Offeror(s), taking into consideration the evaluation factors set forth in this RFP, as per Section II.A., 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(s) without undertaking a new procurement process.

## **11. Contract Awards**

Upon receipt of the signed contractual agreement, the Department will award as per Section II.A., Sequence of Events, or as soon as possible thereafter. The award is subject to appropriate Department and Governing Body approval.

## **12. Protest Deadline**

Any protest by an Offeror must be timely submitted and in conformance with NMSA 1978, § 13-1-172 and applicable procurement regulations. As a Protest Manager has been named in this Request for Proposals, pursuant to NMSA 1978, § 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.**

## **C. GENERAL REQUIREMENTS**

### **1. Acceptance of Conditions Governing the Procurement**

Potential Offerors must indicate their acceptance of these Conditions Governing the Procurement, Section II.C, by completing and signing the Letter of Transmittal form, pursuant to the requirements in Section II.C.29, located in APPENDIX D.

### **2. Incurring Cost**

Any cost incurred by the potential Offeror in preparation, transmittal, and/or presentation of any proposal or material submitted in response to this RFP shall be borne solely by the Offeror. Any cost incurred by the Offeror for set up and demonstration of the proposed equipment and/or system shall be borne solely by the Offeror.

### **3. Prime Contractor Responsibility**

Any contractual agreement that may result from this RFP shall specify that the prime contractor is solely responsible for fulfillment of all requirements of the contractual agreement with the Department which may derive from this RFP. The Department entering into a contractual agreement with a vendor will make payments to only the prime contractor.

### **4. Subcontractors/Consent**

The use of subcontractors is allowed. The prime contractor shall be wholly responsible for the entire performance of the contractual agreement whether or not subcontractors are used. Additionally, the prime contractor must receive approval, in writing, from the Department awarding any resultant contract, before any subcontractor is used during the term of this agreement.

### **5. Amended Proposals**

An Offeror may submit an amended proposal before the deadline for receipt of proposals. Such amended proposals must be complete replacements for a previously submitted proposal and must be clearly identified as such in the transmittal letter. **The Department or the Central Purchasing Office personnel will not merge, collate, or assemble proposal materials.**

### **6. Offeror's Rights to Withdraw Proposal**

Offerors will be allowed to withdraw their proposals at any time prior to the deadline for receipt of proposals. The Offeror must submit a written withdrawal request addressed to the Central Purchasing Office and the Procurement Manager and signed by the Offeror's duly authorized representative.

The approval or denial of withdrawal requests received after the deadline for receipt of the proposals is governed by the applicable procurement regulations.

## 7. Proposal Offer Firm

Responses to this RFP, including proposal prices for services, will be considered firm for one-hundred eighty (180) days after the due date for receipt of proposals or ninety (90) days after the due date for the receipt of a best and final offer, if the Offeror is invited or required to submit one.

## 8. Disclosure of Proposal Contents

The contents of all submitted proposals will be kept confidential until the final award has been completed by the City. At that time, all proposals and documents pertaining to the proposals will be available for public inspection, *except* for proprietary or confidential material as follows:

- a. *Proprietary and Confidential information is restricted to:*
  1. confidential financial information concerning the Offeror's organization; and
  2. information that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act, §§57-3A-1 through 57-3A-7.
- b. An additional but separate redacted version of Offeror's proposal, as outlined and identified in Sections III.B.1.a.i, shall be submitted containing the blacked-out proprietary or confidential information, to facilitate eventual public inspection of the non-confidential version of Offeror's proposal.

**IMPORTANT:** The price of products offered, or the cost of services proposed **SHALL NOT** be designated as proprietary or confidential information.

If a request is received for disclosure of proprietary or confidential materials, the City Attorney and the Chief Procurement Officer shall examine the request and make a written determination that specifies which portions of the proposal should be disclosed. Unless the Offeror takes legal action to prevent the disclosure, the proposal will be so disclosed. The proposal shall be open to public inspection subject to any continuing prohibition on the disclosure of proprietary or confidential information.

## 9. No Obligation

This RFP in no manner obligates the City or any of its Departments to the use of any Offeror's services until a valid written contract is awarded and approved by appropriate authorities.

## 10. Termination

This RFP may be canceled at any time and all proposals may be rejected in whole or in part when the Department determines such action to be in the best interest of the City of Santa Fe.

## 11. Sufficient Appropriation

Any contract awarded as a result of this RFP process may be terminated if sufficient appropriations or authorizations do not exist. Such terminations will be affected by sending written notice to the contractor. The Department's decision as to whether

sufficient appropriations and authorizations are available will be accepted by the contractor as final.

## **12. Legal Review**

The Department requires that all Offerors agree to be bound by the General Requirements contained in this RFP. Any Offeror's concerns must be promptly submitted in writing to the attention of the Central Purchasing Office and the Procurement Manager.

## **13. Governing Law**

This RFP and any agreement with an Offeror which may result from this procurement shall be governed by the laws of the State of New Mexico.

## **14. Basis for Proposal**

Only information supplied in writing by the Central Purchasing Office and the Procurement Manager or contained in this RFP shall be used as the basis for the preparation of Offeror proposals.

## **15. Contract Terms and Conditions**

The contract between the Department and a contractor will follow the format specified by the City and contain the terms and conditions set forth in the Draft Contract Appendix G. However, the contracting Department reserves the right to negotiate provisions in addition to those contained in this RFP Draft Contract with any Offeror. The contents of this RFP, as revised and/or supplemented, and the successful Offeror's proposal will be incorporated into and become part of any resultant contract.

The City discourages exceptions from the contract terms and conditions as set forth in the RFP Draft Contract. Such exceptions may cause a proposal to be rejected as nonresponsive when, in the sole judgment of the City (and its evaluation team), the proposal appears to be conditioned on the exception, or correction of what is deemed to be a deficiency, or an unacceptable exception is proposed which would require a substantial proposal rewrite to correct.

Should an Offeror object to any of the terms and conditions as set forth in the RFP Draft Contract (APPENDIX G) strongly enough to propose alternate terms and conditions in spite of the above, the Offeror must propose **specific** alternative language. The City may or may not accept the alternative language. General references to the Offeror's terms and conditions or attempts at complete substitutions of the Draft Contract are not acceptable to the City and will result in disqualification of the Offeror's proposal.

Offerors must provide a brief discussion of the purpose and impact, if any, of each proposed change followed by the specific proposed alternate wording.

If an Offeror fails to propose any alternate terms and conditions during the procurement process (the RFP process prior to selection as successful Offeror), no proposed alternate terms and conditions will be considered later during the negotiation process. Failure to propose alternate terms and conditions during the procurement process (the RFP process

prior to selection as successful Offeror) is an **explicit agreement** by the Offeror that the contractual terms and conditions contained herein are **accepted** by the Offeror.

#### **16. Offeror's Terms and Conditions**

Offerors must submit with the proposal a complete set of any additional terms and conditions they expect to have included in a contract negotiated with the City. See Section II.C.15 for requirements.

#### **17. Contract Deviations**

Any additional terms and conditions, which may be the subject of negotiation (such terms and conditions having been proposed during the procurement process, that is, the RFP process prior to selection as successful Offeror), will be discussed only between the City and the Offeror selected and shall not be deemed an opportunity to amend the Offeror's proposal.

#### **18. Offeror Qualifications**

The Evaluation Committee may make such investigations as necessary to determine the ability of the potential Offeror to adhere to the requirements specified within this RFP. The Evaluation Committee will reject the proposal of any potential Offeror who is not a Responsible Offeror or fails to submit a Responsive Offer as defined in NMSA 1978, §§ 13-1-83 and 13-1-85.

#### **19. Right to Waive Minor Irregularities**

The Evaluation Committee, upon approval from the Chief Procurement Officer, reserves the right to waive minor irregularities, as defined in Section I.F.26. The Evaluation Committee also reserves the right to waive mandatory requirements, provided that **all** of the otherwise responsive proposals failed to meet the same mandatory requirements and the failure to do so does not otherwise materially affect the procurement. This right is at the sole discretion of the Evaluation Committee.

#### **20. Change in Contractor Representatives**

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

#### **21. Notice of Penalties**

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

#### **22. Department Rights**

The Department, in agreement with the Evaluation Committee, reserves the right to accept all or a portion of a potential Offeror's proposal.

### **23. Right to Publish**

Throughout the duration of this procurement process and contract term, Offerors and contractors must secure from the City written approval prior to the release of any information that pertains to the potential work or activities covered by this procurement and/or City contracts deriving from this procurement. Failure to adhere to this requirement may result in disqualification of the Offeror's proposal or removal from the contract.

### **24. Ownership of Proposals**

All documents submitted in response to the RFP shall become property of the City. If the RFP is cancelled, all responses received shall be destroyed by the Central Purchasing Office unless the Offeror either picks up, or arranges for pick-up, the materials within three (3) business days of notification of the cancellation. Offeror is responsible for all costs involved in return mailing/shipping of proposals.

### **25. Confidentiality**

Any confidential information provided to, or developed by, the contractor in the performance of the contract resulting from this RFP 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.

The Contractor(s) agrees to protect the confidentiality of all confidential information and not to publish or disclose such information to any third party without the City's written permission.

### **26. Electronic mail address required**

A large part of the communication regarding this procurement will be conducted by electronic mail (email). Offeror must have a valid email address to receive this correspondence. (See also Section II.B.5, Response to Written Questions).

### **27. Use of Electronic Versions of this RFP**

This RFP is being made available by electronic means. In the event of conflict between a version of the RFP in the Offeror's possession and the version maintained by the Central Purchasing Office, the Offeror acknowledges that the version maintained by the Central Purchasing Office shall govern. Please refer to: [https://www.santafenm.gov/bids\\_rfps](https://www.santafenm.gov/bids_rfps)

### **28. Campaign Contribution Disclosure Form**

Offeror must complete, sign, and return the Campaign Contribution Disclosure Form, APPENDIX B, as a part of their proposal. This requirement applies regardless of whether a covered contribution was made or not made for the positions of Governor and Lieutenant Governor, City Officials or other identified official. **Failure to complete and return the signed, unaltered form will result in Offeror's disqualification.**

### **29. Letter of Transmittal**

Offeror's proposal must be accompanied by an **unaltered** Letter of Transmittal Form (APPENDIX D), which should be **completed** and **signed** by the individual authorized to

contractually obligate the company, identified in #2 below. **DO NOT LEAVE ANY OF THE ITEMS ON THE FORM BLANK** (N/A, None, Does not apply, etc. are acceptable responses).

The Letter of Transmittal **MUST**:

1. Identify the submitting business entity (its Name, Mailing Address and Phone Number);
2. Identify the Name, Title, Telephone, and Email address of the person authorized by the Offeror's organization to (A) contractually obligate the business entity providing the Offer, (B) negotiate a contract on behalf of the organization; and/or (C) provide clarifications or answer questions regarding the Offeror's proposal content (*A response to B and/or C is only required if the responses differs from the individual identified in A*);
3. Identify sub-contractors, if any, anticipated to be utilized in the performance of any resultant contract award;
4. Describe any relationship with any other entity (such as City, County, State Agency, reseller, etc., that is not a sub-contractor identified in #3), if any, which will be used in the performance of this awarded contract; and
5. Be signed and dated by the person identified in #2 above; attesting to the veracity of the information provided and acknowledging (a) the organization's acceptance of the Conditions Governing the Procurement stated in Section II.C.1, (b) the organizations acceptance of the Section V Evaluation Factors, and (c) receipt of all amendments to the RFP.

### **30. Disclosure Regarding Responsibility**

- A. Any prospective Contractor and any of its Principals who enter into a contract greater than sixty thousand dollars (\$60,000.00) with any state agency or local public body for professional services, tangible personal property, services or construction agrees to disclose whether the Contractor, or any principal of the Contractor's company:
  1. is presently debarred, suspended, proposed for debarment, or declared ineligible for award of contract by any federal entity, state agency or local public body;
  2. has within a three-year period preceding this offer, been convicted in a criminal matter or had a civil judgment rendered against them for:
    - a. the commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) contract or subcontract;
    - b. violation of Federal or state antitrust statutes related to the submission of offers; or
    - c. the commission in any federal or state jurisdiction of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violation of Federal criminal tax law, or receiving stolen property;

3. is presently indicted for, or otherwise criminally or civilly charged by any (federal state or local) government entity with the commission of any of the offenses enumerated in paragraph A of this disclosure;
  4. has, preceding this offer, been notified of any delinquent Federal or state taxes in an amount that exceeds \$3,000.00 of which the liability remains unsatisfied. Taxes are considered delinquent if the following criteria apply.
    - a. The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge of the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.
    - b. The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.
    - c. Have within a three-year period preceding this offer, had one or more contracts terminated for default by any federal or state agency or local public body.)
- B. Principal, for the purpose of this disclosure, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity or related entities.
- C. The Contractor shall provide immediate written notice to the Chief Procurement Officer or other party to this Agreement if, at any time during the term of this Agreement, the Contractor learns that the Contractor's disclosure was at any time erroneous or became erroneous by reason of changed circumstances.
- D. A disclosure that any of the items in this requirement exist will not necessarily result in termination of this Agreement. However, the disclosure will be considered in the determination of the Contractor's responsibility and ability to perform under this Agreement. Failure of the Contractor to furnish a disclosure or provide additional information as requested will render the Offeror nonresponsive.
- E. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the disclosure required by this document. The knowledge and information of a Contractor is not required to exceed that which is the normally possessed by a prudent person in the ordinary course of business dealings.
- F. The disclosure requirement provided is a material representation of fact upon which reliance was placed when making an award and is a continuing material representation of the facts during the term of this Agreement. If during the performance of the contract, the Contractor is indicted for or otherwise criminally or civilly charged by any government entity (federal, state, or local) with commission of any offenses named in this document the Contractor must provide immediate written notice to the Chief Procurement Officer or other party to this Agreement. If it is later determined that the

Contractor knowingly rendered an erroneous disclosure, in addition to other remedies available to the Government, the Chief Procurement Officer may terminate the involved contract for cause. Still further the Chief Procurement Officer may suspend or debar the Contractor from eligibility for future solicitations until such time as the matter is resolved to the satisfaction of the Chief Procurement Officer

### **31. Local Preferences**

The City recognizes the value of revenue derived from local businesses and shall procure goods and/or services locally, when possible, pursuant to Ordinance and the City of Santa Fe Procurement Manual, except for purchases using City, state, and federal grant funds. Applicable City, state and federal law and regulations govern procurements using City, state, or federal funds.

#### **A. Local Preference Qualification**

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 bid or proposal, showing that the business is located within the Santa Fe municipal limits. If an offer is received without a copy of the appropriate State of New Mexico Taxation and Revenue Department issued Business Registration Certificate, the preference will not be applied. A valid resident business certificate is issued by the Taxation and Revenue Department pursuant to NMSA 1978, § 13-1-22.

- a. When the City makes a purchase using a formal request for proposals process, not including contracts awarded on a point-based system, the City shall award an additional 6% 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 non-local resident business who has hired all local 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 point's equivalent to 6% of the total possible points to a local resident business. The City shall award an additional 3% of the total possible points to a business who has hired all local resident business subcontractors.

The maximum available local preference shall be 6%.

#### **B. Solicitations above One Million Dollars (\$1,000,000)**

1. The City shall deem a bid or 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.
2. The City shall deem the bid or 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.

### 32. Living Wage

Compliance with the City of Santa Fe and Santa Fe County's Minimum Wage Rate Ordinances (Living Wage Ordinances). The vendor must comply with the current living wage rate and requirements posted on this page <https://santafenm.gov/economic-development/business-resources/living-wage-information>

## 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 Responses

**Proposals in response to this RFP must be submitted through City of Santa Fe's Purchasing submission link ONLY.** The Offeror need only submit one single electronic copy of each portion of its proposal (Technical and Cost) as outlined below.

Proposals must be submitted in the manner outlined below. Technical and Cost portions of Offerors proposal **must** be submitted in separate uploads as indicated below in this section, and **must** be prominently identified as "Technical Proposal," or "Cost Proposal," on the front page of each upload.

a) **Technical Proposals** – One (1) ELECTRONIC upload must be organized in accordance with Section III.C.1. **Proposal Format**. All information for the Technical Proposal **must be combined into a single file/document for uploading**. The Technical Proposals **SHALL NOT** contain any cost information. **Name the file as such, RFP Number – Company Name – Technical (e.g., 24/20/P - Acme Corp – Technical)**

i. **Confidential Information:** If Offeror's proposal contains confidential information, as defined in Section I.F.6 and detailed in Section II.C.8, Offeror **must** submit **two (2) separate ELECTRONIC technical files. Name the files accordingly:**

- One (1) ELECTRONIC version of the requisite proposals identified above as **unredacted** (def. Section I.F.39) versions for evaluation purposes (example file name, 24/20/P - Acme Corp – Unredacted Technical); and
- One (1) **redacted** (def. Section I.F.30) ELECTRONIC. for the public file, in order to facilitate eventual public inspection of the non-confidential version of Offeror's proposal. Redacted versions **must** be clearly marked as "REDACTED" or "CONFIDENTIAL" on the first page of the electronic file. (Example file name, 24/20/P - Acme Corp – Redacted Technical)

- b) **Cost Proposals** – One (1) ELECTRONIC upload of the proposal containing **ONLY** the Cost Proposal. All information for the cost proposal **must be combined into a single file/document for uploading**. Name the file as such, RFP Number – Company Name – Cost (e.g., 24/20/P - Acme Corp – Cost)

**The ELECTRONIC proposal submission must be fully submitted to:**

<https://cityofsantafenm.sharefile.com/r-r6a199d2a98094545a0fc75efdb971f9b> by the submission deadline in Section II.B.6. Submissions cannot be password protected and **must be a 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 WILL NOT BE ACCEPTED**

Any proposal that does not adhere to the requirements of this Section and **Section III.C.1 Proposal Content and Organization** may be deemed non-responsive and rejected on that basis.

**C. PROPOSAL FORMAT**

All proposals must be submitted as follows:

Organization of files/envelopes for electronic copy proposals:

**1. Proposal Content and Organization**

Direct reference to pre-prepared or promotional material may be used if referenced and clearly marked. Promotional material must be minimal. The proposal must be organized and indexed in the following format and must contain, at a minimum, all listed items in the sequence indicated.

**Technical Proposal – DO NOT INCLUDE ANY COST INFORMATION IN THE TECHNICAL PROPOSAL.**

- A. Signed Letter of Transmittal
- B. Signed Campaign Contribution Form
- C. Table of Contents
- D. Proposal Summary (Optional)
- E. Response to Contract Terms and Conditions (from Section II.C.15)
- F. Offeror's Additional Terms and Conditions (from Section II.C.16)
- G. Response to Specifications (**except Cost information which shall be included ONLY in Cost Proposal/Binder 2**)
  1. Organizational Experience
  2. Oral Presentation (if applicable)
  3. Mandatory Specification
  4. Desirable Specification

5. Local Preferences (if applicable)
- H. Other Supporting Material (if applicable)

**Cost Proposal:**

1. Completed Cost Response Form (APPENDIX C)

Within each section of the proposal, Offerors should address the items in the order indicated above. All forms provided in this RFP must be thoroughly completed and included in the appropriate section of the proposal. **All discussion of proposed costs, rates or expenses must occur ONLY in the Cost Proposal.**

A Proposal Summary may be included in Offeror's Technical Proposal, to provide the Evaluation Committee with an overview of the proposal; however, this material will not be used in the evaluation process unless specifically referenced from other portions of the Offeror's proposal. **DO NOT INCLUDE COST INFORMATION IN THE PROPOSAL SUMMARY.**

## **IV. SPECIFICATIONS**

### **A. GOALS**

The revised General Plan is intended to capture the desired vision and choices related to Santa Fe's future with a 20-year plan that will identify opportunities for beneficial use of the community's resources and guide the advancement of the community. This vision will be accomplished through the implementation of dynamic growth guidance strategies and actionable implementation steps in the interest of ensuring a vibrant sense of place and belonging. These strategies and implementation steps will reflect and promote overarching community values, trends and themes, and correlate concepts such as sustainability, preservation of and access to resources, community and cultural engagement, connectivity, affordability, economic opportunity and prosperity, equity, inclusion, and regional partnerships.

The General Plan will identify desired and attainable goals, each with a set of quantifiable objectives which are correlated with the implementation plan.

To achieve this vision, the City aspires to the following goals:

- 1) Enhance the City's quality of life by ensuring that development is sustainable, and that social equity, physical growth, redevelopment, and natural resource conservation and protection are balanced, guided and dynamic.
- 2) Foster the Santa Fe tradition which enriches everyday life by designing urban spaces conducive to exceptional community character, public safety, and establishing an ecological conservation basis for urban design, while continuing to honor beneficial existing growth patterns.
- 3) Promote a compact urban form that enables the development of affordable housing, provides a mix of housing types and land uses in all areas of the city.
- 4) Promotes the stabilization of neighborhoods by implementing policies and programs that prevent residential and small business displacement.
- 5) Develop a sector planning process that promotes community cohesion, shared ownership and sense of place.
- 6) Reduce automobile dependence by becoming a city where essential goods, services, employment and amenities are available to residents within their neighborhood. Improve transportation network connectivity and provide equitable access to affordable and multimodal transportation that connects underserved communities to services and employment.
- 7) Diversify the economy while enhancing the city's unique character and sense of place.
- 8) Develop a regional growth management policy framework in collaboration with regional partners.
- 9) Promote engagement with regional partners to ensure coordinated growth and development, and annexation and expansion at the City's periphery.
- 10) Develop a comprehensive and enforceable review process that balances the goals of the General Plan when determining planning and development decisions.
- 11) Develop an implementation plan that creates a consistency of purpose across City departments.
- 12) Promote reconciliation of detrimental inconsistencies, disparities and inequities within the city and among its residents.

## **B. OBJECTIVES**

In order to accomplish these goals, the City intends to engage in the General Plan Update, including an extensive community outreach program, that will identify quantifiable and achievable objectives that help answer the following questions:

- 1) “What’s missing and where?” - Identify perceived challenges and shared objectives.
- 2) “Who is it for and how will it help them?” – Identify connections and sources of mutual benefit to the community that promote cohesion and take advantage of opportunities to enhance shared sense of place.
- 3) “What are we trying to deliver and how will it be provided?” - Identify the balance of measures for implementation that best promote, benefit and incentivize livability, equity, health and wellness across the spectrum of the demographic and economic landscape.

## **C. ASSUMPTIONS**

### **City Staff and Consultant Support:**

City staff from the Land Use and Planning Department will actively manage and participate in the revision. The staff will provide all existing data, plans and reports, Geographic Information System (GIS) mapping, and will assist in the reproduction and distribution of materials including mailings, meeting set-up, and other logistical and administrative functions.

City staff will coordinate meeting logistics with any working group, stakeholder group, or committee that may be agreed upon during Task 1. Consultant and City staff will conduct bi-weekly (or as needed) project management meetings (via video conference call) to address project management issues. During especially intense periods, these meetings may take place weekly. Consultant will produce monthly written (PDF format) status reports including a summary of all project activity and correlated invoicing prior to monthly meetings that will be attached to meeting agendas and monthly invoices.

### **Statutory Requirements:**

The General Plan Update will exceed the minimum State of New Mexico Statute requirements outlined in Chapter 3 – Municipalities, Article 19- Planning and Platting and Section 3-19-11 – Legal status of master plan and 3-19-1 – Creation of a Planning Commission and all related “Annotations.”

### **Scope of Service Tasks:**

It is the intent of the Scope of Service Tasks (as described in Section D, “Detailed Scope of Work”) to provide an essential framework of desired deliverables from the project. The General Plan Update consultant is expected to collaborate with the Land Development Code update project team across all three phases, but particularly in Phase 3, where the code will be amended to reflect the goals and policies identified in the General Plan update project. The full Land Development Code project scope is listed in Section I. G. Procurement Library.

## **D. DETAILED SCOPE OF WORK**

### **PHASE 1**

Approximately 12 months

#### **Task 1. Administrative Coordination:**

The City is seeking the best approach, process and best practices to develop the update, communication protocol, and an internal meeting schedule in coordination with City staff as outlined below.

- 1) **Project Team Kick-Off and Pre-planning Coordination, including:**
  - a) Define and come to agreement on the General Plan Update development approach, process outline and best practices.
  - b) Establish methods of communication and content sharing.
  - c) Develop agreed upon plan development groups, engagement partners and strategies, committees, stakeholders that will be part of the development of the plan.
  - d) Conduct in-person introductions and tours as needed. Work with City staff and leadership to evaluate current long-range planning practices and develop strategies to optimize internal workflows and planning activity outcomes.

#### **Task 2. Existing Conditions and Trends**

The City is looking for a baseline of information on existing conditions, including identification of key issues, problems and long-range goals. The City staff will provide all necessary existing materials, data and documentation. The consultant's responsibility will be to analyze this data and document the findings, and to conduct research, outreach, etc. and production of deliverables listed below. All maps will be done within the ArcGIS Software family and will be made compatible with existing City mapping systems.

The analysis should include but is not limited to mapping, surveys, studies, assessments and analysis of the following:

- 1) **Base Mapping**
- 2) **Regional Trends**
  - a) Population and Growth Trends
  - b) Demographic trends
- 3) **Land Capability Analysis**
- 4) **Existing Land Use and Development:**
  - a) Identify developable land, including infill and redevelopment
- 5) **Neighborhoods:** Develop an official "Neighborhood and Districts" map for the City.
  - a) **Downtown:** Conduct a more granular survey and analysis of downtown Santa Fe.
- 6) **Fiscal Sustainability:**
  - a) Include a "value per acre" analysis or similar analysis.
- 7) **Urban Design**
- 8) **Transportation**
- 9) **Public and Private Utilities**
- 10) **Historical and Cultural Facilities**

- 11) **Public Safety**
- 12) **Schools**
- 13) **Parks and Recreation**
- 14) **Housing**
- 15) **Economic Development Assessment**
- 16) **Environmental Stewardship\Natural Resources**
- 17) **Institutional Structures:**
  - a) Ongoing planning efforts and their sponsor departments/jurisdictions.

**Assessment Report:** The findings resulting from analysis of the above items will be summarized in a written (PDF format) Assessment Report. The findings will identify relevant planning issues, a summary of the findings, and policy implications for the General Plan. The report will be reviewed by the appropriate groups/committees as well as the public. It will be published on the project website where the public will be able to make comments and recommendations based on the report's findings.

**Task 3. Digital User Platform (development and refinement to continue through all phases)**

The City seeks a web-based dynamic interface tool that will enable staff, elected officials, the public, developers and stakeholders to access a user-friendly on-line version of the General Plan. The platform will become the Planning and Development Hub for the City after the General Plan is adopted, and therefore must be accessible and updatable by City staff.

- 1) The platform must include all maps, data and studies. The maps, data and studies should take advantage of ESRI Storymaps or similar technology to be interactive and easily understood.
- 2) The platform will integrate other adopted City plans, including the plan texts and map components such as the Residential Pipeline Map, Bicycle Master Plan, the Pedestrian Master Plan, the Water Plan, etc. The General Plan components should be included as map layers so they can be overlaid with components from other plans.
- 3) The platform will include an engagement section that becomes the main hub for digital engagement for the Planning and Land Use Department.
- 4) The platform will be built in such a way that other planning projects such as the Land Development Code website and permit searches can easily be integrated.
- 5) The platform will include a backend, dashboard-style user interface that enables City staff to run reports and manage the General Plan project.
- 6) The platform will be built with translation and accessibility options that meet City engagement standards.

**PHASE 2**

Approximately 6 months (in tandem with LDC update Phase 2)

**Task 4. Public Engagement Plan**

The coordination and execution of community outreach and engagement cannot be understated as a crucial component to the success of this project. Based on Public Engagement Plans submitted by the Consultant, a special coordination meeting shall occur to be determined in Task 1 for the purpose of refining the General Plan so that each stakeholder consents to it and has a role in its success.

- 1) The Public Engagement Plan should include the following elements:

- a) Inclusive meeting provisions, such as
    - i) Food and refreshments
    - ii) Childcare
    - iii) Interpretation services
    - iv) Youth-oriented activities and meetings
    - v) Larger events may have live entertainment to attract a wider audience
    - vi) Collaboration with community partners such as churches, schools and organizations
  - b) Plan to coordinate with City staff, leadership, local organizations, and project Consultants to recruit equity representatives to drive engagement in their community, attend public meetings, and participate in working groups/committees.
    - i) Representatives should be from an underrepresented community, such as Spanish speaking, indigenous, youth, low-income, etc.
    - ii) The plan should recommend payment structure for equity representatives.
  - c) Review and consider Culture, History, Art, Reconciliation and Truth (CHART) outcomes
  - d) Review and consider Midtown outreach outcomes.
- 2) The consultant should provide local engagement and Public Relations (PR) support. subcontracted by the offerors.
- a) The PR team will work directly with City of Santa Fe Communications and Public Engagement teams to develop outreach materials that meet City standards.
  - b) The Public Engagement Plan will be developed using the forthcoming City of Santa Fe Community Engagement Guide to craft all engagement materials. The City Clerk's office is expected to adopt the Engagement Guide in the coming months and will be shared with the project team at that time.
  - c) The PR team will provide all project engagement materials in both English and Spanish and meet City accessibility standards for online and in-person engagement.
  - d) The PR team will partner with local community-based organizations to conduct targeted engagement activities.

#### **Task 5. Assessment Report**

- Create a report on the engagement findings and identify the City's short-term and long-term needs and desires.
- The report should include a summary of findings from Task 2, Existing Conditions and Trends, a summary of findings from Task 4, Public Engagement, and a narrative description of the steps that should be taken to address those findings.

### **PHASE 3**

Approximately 24 months (in tandem with LDC update phase 3)

#### **Task 6. Growth Scenario Planning**

Utilizing previous tasks' analysis and engagement, the Consultant will develop several future growth scenarios for future land use and development patterns. The Consultant will use dynamic visualization and analysis techniques to communicate the outcomes of each scenario to the City and the public. These scenarios will be used throughout the planning draft process to demonstrate the outcomes of proposed planning policies.

## **Task 7. General Plan Draft**

The consultant will prepare the first draft of the General Plan. The draft shall include analysis and recommendations for each of the topics listed below. Other than certain required sections, the General Plan may be organized in a manner that best suites the project's overall goals, the vision of the project team and the consultant's workflow as approved by City Staff.

- 1) Executive Summary (required)
- 2) Introduction, Vision & Themes
- 3) Existing Conditions and Trends
  - a) See "Task 2" above.
- 4) Assessment Report (required)
  - a) Report engagement findings and identify of the City's short-term and long-term needs and desires.
- 5) Land Use and Growth Scenarios (see "Task 6" above)
  - a) Develop the Future Land Use Map based on collaboration with Land Development Code Rewrite team and goals and objectives determined in this General Plan. Integrate Future Land Use Map into Digital User Platform to demonstrate the connection to other elements of the General Plan.
- 6) Regional Planning
  - a) Priorities, major projects and organizational structures.
- 7) City Character
  - a) Provide updated analysis of existing City Character, emphasizing areas of the City outside of historic overlays (Historic-area character is already well established and documented, only needs to be updated with current conditions.)
  - b) Identify desired urban form for all areas of the City, coinciding with existing neighborhood boundaries, opportunity zones, redevelopment areas, master planned areas, and other contextual information.
- 8) Sector and Special Area Planning
  - a) Identify areas for future Sector and Special Area scale planning.
  - b) Develop strategies for Special Areas places for locals in addition to tourists.
  - c) Assess Special Areas at granular level including economic activity, mobility, urban design and housing.
  - d) Propose "catalyzing" City-led redevelopment projects of city owned property and Right of Way (R.O.W.) to be incorporated into sector plans.
- 9) Mobility and Accessibility
  - a) Integrate goals existing plans including Multimodal Transition Plan, Bicycle/Ped/Transit Plans, Sustainability Plan
  - b) Using recommendations from existing plans, identify quantifiable targets for transportation mode-shift.
    - i) Identify quantifiable targets for infrastructure improvements to achieve mode-shift.
  - c) Develop a "Connectivity and Street Network" map that requires future development to adhere to a street network that creates permeable, publicly accessible new development and improves connectivity in existing neighborhoods.
- 10) Infrastructure and Facilities

- a) Integrate various infrastructure and facility plans to ensure various Capital projects are optimized and not redundant.
  - b) Identify infrastructure needs and desires such as improved internet, areas to extend utilities, etc.
  - c) Using ongoing facilities evaluation, identify top priorities for new facilities and facility improvements.
  - d) Evaluate Green Infrastructure and recommend improvements.
- 11) Climate and Natural Resources
- a) Integrate relevant plans (such as water and sustainability plans) and correlate with goals and objectives of the General Plan.
- 12) Affordability and Human Services
- a) Integrate various Human Service plans such as Senior Services, Youth and Family Services, Recreation Plans
  - b) Make recommendations for additional affordable housing tools
  - c) Make “Affordable Living” recommendations that address other aspects of affordability beyond housing.
- 13) Development Review Guidelines
- a) Develop review processes to assess private and public development for compliance with the General Plan.
- 14) Glossary
- 15) Appendices

### **Task 8. Implementation and Administration Plan**

Develop an Implementation Plan with the following components:

- a) Provide detailed Implementation Plan that ties each recommendation to achievable goals and objectives.
  - i) Each goal/objective should include proposed cost, departmental responsibility, and timeline.

Administration Plan should include procedures for the following:

- i) Annual progress and action reports
- ii) C.I.P. Plan update process
- iii) 5-year reviews
- iv) 20-year update timeline from planned adoption year
- v) Identify 40-80+ year elements

### **Task 9. Plan Adoption and Publication**

The consultants will work in tandem with City staff and City leadership throughout the duration of the General Plan adoption process. The General Plan adoption related responsibilities include but are not limited to:

- i) Attend and present to commissions, board and the governing body.
- ii) Respond to questions from the public, City staff and leadership regarding all aspects of the General Plan
- iii) Make any amendments necessary that are identified during the adoption process.
- iv) Assist with the transition to the new General Plan as necessary.

After adoption, the consultants will be responsible for the publication of General Plan, including:

- i) Providing hard copies to the City and stakeholders if desired
- ii) Publishing the final adopted General Plan to the project website.
- iii) Finalizing any other aspects of the project.

## **B. TECHNICAL SPECIFICATIONS**

### **1. Organizational Experience**

Offeror **must**:

- a) provide a detailed description of at least three (3) relevant projects with city, county or state governments or the private sector. The experience of all proposed subcontractors must be described. The narrative **must** thoroughly describe how the Offeror has supplied expertise for similar contracts and must include the extent of their experience, expertise and knowledge as a provider of comprehensive and community planning consultation. All comprehensive, land use and community planning consultation provided to private sector will also be considered.
- b) provide a brief resume for all key personnel Offeror proposes to use in performance of the resulting contract, should Offeror be awarded. Key personnel is identified as the Project Principal (or equivalent), project planners, graphic, technology and administrative support staff. Offeror must include key personnel education, work experience and relevant certifications/licenses.

### **2. Mandatory Specification**

The Offeror's proposal must:

- a. Demonstrate a proven track record of General Plan rewrites (or Comprehensive Plan, Master Plan, etc. of a similar scope to this project) for municipalities of comparable size to Santa Fe. Offeror should give a detailed explanation of the municipalities they have provided service for and the size of the municipality.
- b. Describe their knowledge and philosophies related to comprehensive planning in a contemporary municipal setting and how that knowledge and philosophy is aligned with City of Santa Fe goals, objectives, assumptions and scope of work as stated in this RFP.
- c. Explain how they have demonstrated the ability to successfully collaborate with City staff, leadership, the public and other consulting firms working on concurrent projects relevant to a General Plan Rewrite Project.
- d. Provide a detailed description of how the offeror will complete the phases and tasks listed in Section IV.D. taking into account the City's Goals, Objectives and Assumptions. In particular, the description must include:
  - i. Detailed description of Digital User Platform including platform, integration with City ITT, and scope.

- ii. Detailed description of scenario planning tools including platform, methods, integration in the Digital User Platform, and relation to the General Plan Draft as identified in Task 7.
  - iii. Proposed outline of the General Plan Draft demonstrating inclusion of all topics identified in Task 7.
- e. The description for Phase 3 must detail how the Offeror will be integrating the concurrent Land Development Code Rewrite project.

### **3. Desirable Specification**

- a. Offeror should demonstrate a proven track record of General Plan rewrites (or Comprehensive Plan, Master Plan, etc. of a similar scope to this project) for municipalities of comparable size to Santa Fe. Offeror should give a detailed explanation of the municipalities they have provided service for and the size of the municipality.
- b. Offeror should describe their knowledge and philosophies related to comprehensive planning in a contemporary municipal setting and how that knowledge and philosophy is aligned with City of Santa Fe goals and the General Plan as stated in this RFP.
- c. Offeror should explain how they have demonstrated the ability to successfully collaborate with City staff, leadership, the public and other consulting firms working on concurrent projects relevant to the General Plan Rewrite Project.
- d. Offeror should explain their specific understanding of the City of Santa Fe's unique history, geographic context and social climate. The offeror should include any experience working with Spanish speaking and minority communities.
- e. Offeror is encouraged to include alternatives based on the Offeror's expertise, past successes and proven outcomes that support the City's vision, goals and objectives.

## **C. BUSINESS SPECIFICATIONS**

### **1. Letter of Transmittal Form**

The Offeror's proposal **must** be accompanied by the Letter of Transmittal Form located in APPENDIX D. The form must be signed by the person authorized to obligate the company.

### **2. Campaign Contribution Disclosure Form**

The Offeror must complete an unaltered Campaign Contribution Disclosure Form and submit a signed copy with the Offeror's proposal. This must be accomplished whether or

not an applicable contribution has been made. (See APPENDIX B). **Failure to complete and return the signed, unaltered form will result in Offeror's disqualification.**

**3. Oral Presentation**

If selected as a finalist, Offerors agree to provide the Evaluation Committee the opportunity to interview proposed staff members identified by the Evaluation Committee, at the option of the Department. The Evaluation Committee may request a finalist to provide an oral presentation of the proposal as an opportunity for the Evaluation Committee to ask questions and seek clarifications.

**4. Cost**

Offerors must complete the Cost Response Form in APPENDIX C. Cost will be measured by the total cost of all three phases as shown on the Cost Response Form.

**5. Local Preference**

To ensure adequate consideration and application of NMSA 1978, § 13-1-21, Offerors **MUST** include a copy, in this section, of its NM Resident preference certificate, as issued by the New Mexico Taxation and Revenue Department.

## V. EVALUATION

### A. EVALUATION POINT SUMMARY

The following is a summary of evaluation factors with point values assigned to each. These weighted factors will be used in the evaluation of individual potential Offeror proposals by sub-category.

| <b>Evaluation Factors</b><br><i>(Correspond to section IV.B and IV C)</i>        | <b>Points Available</b> |
|--|-------------------------|
| <b>B. Technical Specifications</b>   |                         |
| B. 1. Organizational Experience  | 200                     |
| B. 2. Mandatory Specification  | 250                     |
| B. 3. Desirable Specification  | 200                     |
| <b>C. Business Specifications</b>  |                         |
| C.1. Letter Of Transmittal   | Pass/Fail               |
| C.2. Campaign Contribution Disclosure Form                                       | Pass/Fail               |
| C.3. Oral Presentations  | 200                     |
| C.4. Cost  | 150                     |
| <b>TOTAL POINTS AVAILABLE</b>  | <b>1000</b>             |
| C.5. City of Santa Fe Local Preference per Section IV C. 2                       | <b>60</b>               |
| C.5. City of Santa Fe Local Preference using Local Subcontractors Section IV C.2 | <b>30</b>               |

Table 1: Evaluation Point Summary

### B. EVALUATION FACTORS

#### 1. B.1 Organizational Experience (See Table 1)

Points will be awarded based on the thoroughness and clarity of Offeror's response in this Section. The Evaluation Committee will also weigh the relevancy and extent of Offeror's experience, expertise and knowledge; and of personnel education, experience and certifications/licenses.

#### 2. B.2 Mandatory Specifications

Points will be awarded based on the thoroughness and clarity of Offeror's response in this Section. The Evaluation Committee will also weigh the relevancy and extent of Offeror's response to each mandatory specification and how well it was explained.

#### 3. B.3 Desirable Specifications

Points will be awarded based on the thoroughness and clarity of Offeror's response in this Section. The Evaluation Committee will also weigh the extent of Offeror's knowledge of Santa Fe and working with spanish speaking and minority communities.

**4. C.1 Letter of Transmittal (See Table 1)**

Pass/Fail only. No points assigned.

**5. C.2 Campaign Contribution Disclosure Form (See Table 1)**

Pass/Fail only. No points assigned.

**6. C.3 Oral Presentation (See Table 1)**

Points will be awarded based on the quality, organization and effectiveness of communication of the information presented, as well as the professionalism of the presenters and technical knowledge of the proposed staff. Prior to Oral Presentation, the Department will provide the Offeror a presentation agenda. (If no Oral Presentations are held, all Offerors will receive the maximum total points available for this Evaluation Factor).

**7. C.4 Cost (See Table 1)**

The evaluation of each Offeror's cost proposal will be conducted using the following formula: The formula below will use the total cost of all three phases as shown in the Cost Response Form in this RFP.

$$\frac{\text{Lowest Responsive Offeror's Cost}}{\text{Each Offeror's Cost}} \times \text{Available Award Points}$$

**8. C.5. Local Preferences**

Percentages will be determined based upon the point-based system outlined below.

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 bid or proposal, showing that the business is located within the Santa Fe municipal limits. If an offer is received without a copy of the appropriate State of New Mexico Taxation and Revenue Department issued Business Registration Certificate, the preference will not be applied. A valid resident business certificate is issued by the Taxation and Revenue Department pursuant to NMSA 1978, § 13-1-22.

- A. When the City makes a purchase using a formal request for proposals process, not including contracts awarded on a point-based system, the City shall award additional 6% 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 non-local resident business who has hired all local 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 point's equivalent to 6% of the total possible points to a local resident business. The City shall award an additional 3% of the total possible points to a business who has hired all local resident business subcontractors.

The maximum available local preference shall be 6%.

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

1. The City shall deem a bid or 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.
2. The City shall deem the bid or 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 subcontracted services go to subcontractors who are resident businesses.

**C. EVALUATION PROCESS**

1. All Offeror proposals will be reviewed for compliance with the requirements and specifications stated within the RFP. Proposals deemed non-responsive will be eliminated from further consideration.
2. The Central Purchasing Office or/and the Procurement Manager may contact the Offeror for clarification of the response as specified in Section II. B.7.
3. Responsive proposals will be evaluated on the factors in Section IV, which have been assigned a point value in Section V. 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 Section V will be recommended for award (as specified in Section II.B.11). Please note, however, that a serious deficiency in the response to any one factor may be grounds for rejection regardless of overall score.

**APPENDIX A**  
**ACKNOWLEDGEMENT OF RECEIPT FORM**

**REQUEST FOR PROPOSALS**  
**General Plan Update**  
**24/20/P**  
**ACKNOWLEDGEMENT OF RECEIPT FORM**

This Acknowledgement of Receipt Form should be signed and submitted no later than 3.00pm MDT on November 1, 2023. Only potential Offerors who elect to return this form will receive copies of all submitted questions and the written responses to those questions, as well as any RFP amendments, if any are issued.

In acknowledgement of receipt of this Request for Proposals, the undersigned agrees that he or she has received a complete copy of the RFP, beginning with the title page, and ending with APPENDIX G.

The name and address below will be used for all correspondence related to the Request for Proposals.

ORGANIZATION: \_\_\_\_\_

CONTACT NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_ PHONE NO.: \_\_\_\_\_

EMAIL: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

**Submit Acknowledgement of Receipt Form to:**  
To: Central Purchasing  
Email: [Purchasing\\_RFP@santafenm.gov](mailto:Purchasing_RFP@santafenm.gov)  
Subject Line: General Plan (Comprehensive/Master plan) Update RFP # **24/20/P**

**APPENDIX B**  
**CAMPAIGN CONTRIBUTION DISCLOSURE FORM**

## CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, §§ 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, § 13-1-181 or a contract that is executed may be ratified or terminated pursuant to NMSA 1978, § 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, §§ 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:**

Mayor Alan M Webber  
Councilor Signe Lindell, Pro-tem  
Councilor Renee Villarreal  
Councilor Michael Garcia  
Councilor Carol Romero-Wirth  
Councilor Lee Garcia  
Councilor Christopher Rivera  
Councilor Amanda Chavez  
Councilor Jaime Cassutt

**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)

**APPENDIX C**  
**COST RESPONSE FORM**

## APPENDIX C COST RESPONSE FORM

| <b>Description</b>                                  | <b>Estimated Hours</b> | <b>Cost</b> |
|---|------------------------|-------------|
| Task 1: Administrative Coordination                 |                        |             |
| Task 2: Existing Conditions and Trends              |                        |             |
| Task 3: Digital User Platform                       |                        |             |
| <b>Phase 1: Total Cost</b>                          |                        |             |
| Task 4: Public Engagement                           |                        |             |
| Task 5: Assessment Report:                          |                        |             |
| <b>Phase 2: Total Cost</b>                          |                        |             |
| Task 6: Scenario Planning                           |                        |             |
| Task 7: General Plan Draft                          |                        |             |
| Task 8: Implementation Plan                         |                        |             |
| Task 9: General Plan Adoption                       |                        |             |
|   |                        |             |
| <b>Phase 3: Total Cost</b>                          |                        |             |
| <b>ALL PHASES TOTAL COST</b>                        |                        |             |
| <b>Additional Tasks (list any additional tasks)</b> |                        |             |
|   |                        |             |

All amounts provided must include all labor, materials, equipment, transportation, configuration, installation, training and profit to provide the goods and/or services described in Section IV.A, (as amended by any current RFP amendments for the period specified).

**APPENDIX D**  
**LETTER OF TRANSMITTAL FORM**

## APPENDIX D

### Letter of Transmittal Form

**ITEMS #1 to #4 EACH MUST BE COMPLETED IN FULL (pursuant to Section II.C.29). DO NOT LEAVE ANY ITEM BLANK!** (N/A, None, Does not apply, etc. are acceptable responses.)

**RFP#: 24/20/P**

**1. Identify the following information for the submitting organization:**

|                        |  |
|------------------------|--|
| <b>Offeror Name</b>    |  |
| <b>Mailing Address</b> |  |
| <b>Telephone</b>       |  |
| <b>FED ID#</b>         |  |
| <b>NM CRS#</b>         |  |

**2. 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<br>Contractually Obligate | B<br>Negotiate* | C<br>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.

**3. 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)

**4. 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)

**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 in item #1, above, I accept the Conditions Governing the Procurement, as required in Section II.C.1. of this RFP;
- I concur that submission of our proposal constitutes acceptance of the Evaluation Factors contained in Section V of this RFP; and
- I acknowledge receipt of any and all amendments to this RFP, if any.

\_\_\_\_\_, 20\_\_\_\_  
Authorized Signature and Date (Must be signed by the individual identified in item #2.A, above.)

**APPENDIX E**  
**NON-COLLUSION AFFIDAVIT**

# 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 \_\_\_\_\_

**APPENDIX F**  
**CONFLICT OF INTEREST**

# CONFLICT OF INTEREST STATEMENT FOR CONSULTING FIRMS

*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 Principal Planning Consultant 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 Planning Consultant and known key personnel needs to describe the conflict.

The Planning Consultant agrees that, if after award, an organizational conflict of interest is discovered, the Planning Consultant makes an immediate and full written disclosure to the City that includes a description of the action that the Planning Consultant 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 Planning Consultant 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 General Plan Update. For the duration of this firm's involvement in the General Plan Update contract, this firm agrees not to accept any gift, benefit, 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 General Plan Update contract.

I certify that this firm will keep all General Plan Update 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 General Plan Update contract. I understand that if this firm leaves this General Plan Update 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 General Plan Update 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 General Plan Update 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.

**APPENDIX G**  
**DRAFT CONTRACT**

**The Agreement included in this Appendix G represents the contract the City intends to use to make an award. The City of Santa Fe reserves the right to modify the Agreement prior to, or during, the award process, as necessary.**

## CITY OF SANTA FE

### PROFESSIONAL SERVICES AGREEMENT General Plan Update

THIS Contract is made and entered into by and between the City of Santa Fe, New Mexico, hereinafter referred to as the "City," and **NAME OF CONTRACTOR**, 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 Contract is in accordance with the provisions of the New Mexico Procurement Code (NMSA 1978, 13-1-28 et seq.) pursuant to NMSA 1978, § 13-1-95.2.E; and NMSA 1978, § 13-1-111.

**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 Contract; and

**WHEREAS**, the Contractor does hereby accept its designation as [professional service], rendering services related to [insert services] for the City, as set forth in this Contract; and

**WHEREAS**, it is agreed by the parties that the performance of the professional services is for a period of [insert term], as directed by the City.

**NOW, THEREFORE**, the parties hereby agree as follows:

**1. Scope of Work.**

The Contractor shall provide the following services-for the City:

The General Plan Update is intended to capture the desired vision and choices related to Santa Fe's future that will identify opportunities for beneficial use of the community's resources and guide the advancement of the community. This will be accomplished through the implementation of dynamic growth guidance strategies and actionable implementation steps in the interest of ensuring a vibrant sense of place and belonging. These will reflect and promote overarching community values, trends and themes, and correlate concepts such as sustainability, preservation of and access to resources, community and cultural engagement, connectivity, affordability, economic opportunity and prosperity, equity, inclusion, and regional partnerships.

See Exhibit A for the full Scope of Work.

2. **Standard of Performance; Licenses.**

A. 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.

2. **Compensation.**

A. The City shall pay to the Contractor in full payment for services satisfactorily performed at the rate of \_\_\_\_\_ dollars (\$\_\_\_\_\_) per hour (OR BASED UPON DELIVERABLES, MILESTONES, BUDGET, ETC.), such compensation not to exceed (AMOUNT), excluding/including gross receipts tax. The New Mexico gross receipts tax levied on the amounts payable under this Contract totaling (AMOUNT) shall be paid by the City to the Contractor. **The total amount payable to the Contractor under this Contract, including gross receipts tax and expenses, shall not exceed (AMOUNT). This amount is a maximum and not a guarantee that the work assigned to be performed by Contractor under this Contract 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 Contract 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 Contract being amended in writing prior to those services in excess of the total compensation amount being provided.**

B. Payment is subject to availability of funds pursuant to the Appropriations Paragraph set forth below and to any negotiations between the parties from year to year pursuant to Paragraph 1, Scope of Work, and to approval by the City. All invoices **MUST BE** received by the City no later than thirty (30) days after the termination of the Fiscal Year in which the services were delivered. Invoices received after such date **WILL NOT BE PAID.**

C. Contractor must submit a detailed statement accounting for all services performed and expenses incurred. If the City finds that the services are not acceptable, within thirty days after the date of receipt of written notice from the Contractor that payment is requested, it shall provide the Contractor a letter of exception explaining the defect or objection to the services, and outlining steps the Contractor may take to provide remedial action. Upon certification by the City that the services have been received and accepted, payment shall be tendered to the Contractor within thirty days after the date of acceptance. If payment is made by mail, the payment shall be deemed tendered on the date it is postmarked. However, the City shall not incur late charges, interest, or penalties for failure to make payment within the time specified herein.

**3. Term.**

THIS CONTRACT SHALL NOT BECOME EFFECTIVE UNTIL APPROVED BY THE CITY. This Contract shall terminate on **DATE** unless terminated pursuant to paragraph 4 (Termination), or paragraph 5 (Appropriations). This Contract will not exceed a total of four (4) years in accordance with NMSA 1978, §§ 13-1-150 through 152.

**4. Termination.**

A. Termination. This Contract may be terminated by either of the parties hereto upon written notice delivered to the other party at least thirty (30) days prior to the intended date of termination. Except as otherwise allowed or provided under this Contract, the City's sole liability upon such termination shall be to pay for acceptable work performed prior to the Contractor's receipt of the notice of termination, if the City is the terminating party, or the Contractor's sending of the notice of termination, if the Contractor is the terminating party; 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 Contract. The Contractor shall submit an invoice for such work within thirty (30) days of receiving or sending the notice of termination. Notwithstanding the foregoing, this Contract may be terminated immediately upon written notice to the Contractor if the Contractor becomes unable to perform the services contracted for, as determined by the City or if, during the term of this Contract, the Contractor or any of its officers, employees or agents is indicted for fraud, embezzlement or other crime due to misuse of City funds or due to the Appropriations paragraph herein. *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 CONTRACT.*

B. Termination Management. Immediately upon receipt by either the City or the Contractor of notice of termination of this Contract the Contractor shall: 1) not incur any further obligations for salaries, services or any other expenditure of funds under this Contract without written approval of the City; 2) comply with all directives issued by the City in the notice of termination as to the performance of work under this Contract; and 3) take such action as the City shall direct for the protection, preservation, retention or transfer of all property titled to the City and records generated under this Contract. Any non-expendable personal property or equipment provided to or purchased by the Contractor with contract funds shall become property of the City upon termination and shall be submitted to the City as soon as practicable.

**5. Appropriations.**

The terms of this Contract are contingent upon sufficient appropriations and authorization being made by the City Council for the performance of this Contract. If sufficient appropriations and authorization are not made by the City Council, 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.

**6. 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.

**7. 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.

**8. 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.

**9. 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.

**10. 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.

**11. 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.

**12. 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 12 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 12 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 12 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.

**13. Amendment.**

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

B. If the City proposes an amendment to the Agreement to unilaterally reduce funding due to budget or other considerations, the Contractor shall, within thirty (30) days of receipt of the proposed Amendment, have the option to terminate the Agreement, pursuant to the termination provisions as set forth in Article 4 herein, or to agree to the reduced funding.

**14. Entire Contract.**

This Contract, together with any other documents incorporated herein by reference and all related Exhibits and Schedules constitutes the sole and entire Contract of the Parties with respect to the subject matter of this Contract, 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 Contract, and the related Exhibits and Schedules, the statements in the body of this Contract shall control.

**15. Penalties for violation of law.**

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

**16. 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.

**17. 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, sec. 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.

**18. 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.

**19. 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.

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

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

**21. 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

**22. 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. In the event that 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.

**23. 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.

**24. 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.

**25. 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.

**26. 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: [insert name, address and email].

To the Contractor: [insert name, address and email].

**27. 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 into a binding contract.

**28. Merger.**

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

**29. Non-Collusion.**

In signing this Contract, 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.

**30. 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 Contract and under law or equity.

**31. Equitable Remedies.**

The Contractor acknowledges that its failure to comply with any provision of this Contract 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 Contract 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.

**32. Default and Force Majeure.**

The City reserves the right to cancel all or any part of any orders placed under this Contract without cost to the City, if the Contractor fails to meet the provisions of this Contract and, except as otherwise provided herein, to hold the Contractor liable for any excess cost occasioned by the City due to the Contractor's default. The Contractor shall not be liable for any excess costs if failure to perform the order arises out of causes beyond the control and without the fault or negligence of the Contractor; such causes include, but are not restricted to, acts of God or the public enemy, acts of the State or Federal Government, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, unusually severe weather and defaults of 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 Contract.

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:

\_\_\_\_\_  
ALAN WEBBER, MAYOR

\_\_\_\_\_  
NAME

DATE: \_\_\_\_\_

\_\_\_\_\_  
TITLE

DATE: \_\_\_\_\_

CRS# \_\_\_\_\_

Registration # \_\_\_\_\_

ATTEST:

\_\_\_\_\_  
KRISTINE BUSTOS MIHELIC, CITY CLERK

CITY ATTORNEY'S OFFICE:

\_\_\_\_\_  
SENIOR ASSISTANT CITY ATTORNEY

APPROVED FOR FINANCES:

\_\_\_\_\_  
EMILY OSTER, FINANCE DIRECTOR

\_\_\_\_\_

Org. Name/Org#.

## **Exhibit A**

### **Scope of Work**

The Consultant Services may include, but are not limited to, administrative coordination and support, public engagement, land use planning analysis and recommendations delivered in a variety of formats including reports, maps, digital and paper publications. The Consultant Team may include subcontractors, community organizations and other relevant members needed to perform the required tasks.

Tasks and Phases are meant to provide guidance on structure and schedule of deliverables but may change due to circumstances including but not limited to Land Development Code Rewrite progression, Consultant recommendations or other circumstances.

The Tasks and Phases listed below are intended to include the entire General Plan Update project, however only Phase 1 is currently funded. The subsequent Phases 2 and 3 will be undertaken as funding becomes available in subsequent fiscal years.

#### **A. GOALS**

The revised General Plan is intended to capture the desired vision and choices related to Santa Fe's future with a 20-year plan that will identify opportunities for beneficial use of the community's resources and guide the advancement of the community. This will be accomplished through the implementation of dynamic growth guidance strategies and actionable implementation steps in the interest of ensuring a vibrant sense of place and belonging. These will reflect and promote overarching community values, trends and themes, and correlate concepts such as sustainability, preservation of and access to resources, community and cultural engagement, connectivity, affordability, economic opportunity and prosperity, equity, inclusion, and regional partnerships.

The General Plan Update will identify desired and attainable goals, each with a set of quantifiable objectives which are correlated with the implementation plan.

To achieve this vision, the City aspires to the following goals:

- 1) Enhance the City's quality of life by ensuring that development is sustainable, and that social equity, physical growth, redevelopment, and natural resource conservation and protection are balanced, guided and dynamic.
- 2) Foster the Santa Fe tradition which enriches everyday life by designing urban spaces conducive to exceptional community character, public safety, and establishing an ecological conservation basis for urban design, while continuing to honor beneficial existing growth patterns.
- 3) Promote a compact urban form that enables the development of affordable housing, provides a mix of housing types and land uses in all areas of the city.
- 4) Promotes the stabilization of neighborhoods by implementing policies and programs that prevent residential and small business displacement.
- 5) Develop a sector planning process that promotes community cohesion, shared ownership and sense of place.

- 6) Reduce automobile dependence by becoming a city where essential goods, services, employment and amenities are available to residents within their neighborhood. Improve transportation network connectivity and provide equitable access to affordable and multimodal transportation that connects underserved communities to services and employment.
- 7) Diversify the economy while enhancing the city's unique character and sense of place.
- 8) Develop a regional growth management policy framework in collaboration with regional partners.
- 9) Promote engagement with regional partners to ensure coordinated growth and development, and annexation and expansion at the City's periphery.
- 10) Develop a comprehensive and enforceable review process that balances the goals of the General Plan when determining planning and development decisions.
- 11) Develop an implementation plan that creates a consistency of purpose across City departments.
- 12) Promote reconciliation of detrimental inconsistencies, disparities and inequities within the city and among its residents.

## **B. OBJECTIVES**

In order to accomplish these goals, the City intends to engage in the General Plan Update, including an extensive community outreach program, that will identify quantifiable and achievable objectives that help answer the following questions:

- 1) "What's missing and where?" - Identify perceived challenges and shared objectives.
- 2) "Who is it for and how will it help them?" – Identify connections and sources of mutual benefit to the community that promote cohesion and take advantage of opportunities to enhance shared sense of place.
- 3) "What are we trying to deliver and how will it be provided?" - Identify the balance of measures for implementation that best promote, benefit and incentivize livability, equity, health and wellness across the spectrum of the demographic and economic landscape.

## **C. ASSUMPTIONS**

### **City Staff and Consultant Support:**

City staff from the Planning and Land Use Department will actively manage and participate in the revision. The staff will provide all existing data, plans and reports, Geographic Information System (GIS) mapping, and will assist in the reproduction and distribution of materials including mailings, meeting set-up, and other logistical and administrative functions.

City staff will coordinate meeting logistics with any working group, stakeholder group, or committee that may be agreed upon during Task 1. Consultant and City staff will conduct bi-weekly (or as needed) project management meetings (via video conference call) to address project management issues. During especially intense periods, these meetings may take place weekly. Consultant will produce monthly written (PDF format) status reports including a summary of all project activity and correlated invoicing prior to monthly meetings that will be attached to meeting agendas and monthly invoices.

**Statutory Requirements:**

The General Plan Revision will exceed the minimum State of New Mexico Statute requirements outlined in Chapter 3 – Municipalities, Article 19- Planning and Platting and Section 3-19-11 – Legal status of master plan and 3-19-1 – Creation of a Planning Commission and all related “Annotations.”

**Scope of Service Tasks:**

It is the intent of the Scope of Service Tasks to provide an essential framework of desired deliverables from the project. The General Plan Update consultant is expected to collaborate with the Land Development Code update project team across all three phases, but particularly in Phase 3, where the code will be amended to reflect the goals and policies identified in the General Plan update project. The full Land Development Code project scope is listed in Section I. G. Procurement Library.

**D. DETAILED SCOPE OF WORK**

**PHASE 1**

Approximately 12 months

**Task 1. Administrative Coordination:**

The City is seeking the best approach, process and best practices to develop the update, communication protocol, and an internal meeting schedule in coordination with City staff as outlined below.

- 1) Project Team Kick-Off and Pre-planning Coordination, including:
  - a) Define and come to agreement on plan update development approach, process outline and best practices.
  - b) Establish methods of communication and content sharing.
  - c) Develop agreed upon plan development groups, engagement partners and strategies, committees, stakeholders that will be part of the development of the General Plan.
  - d) Conduct in-person introductions and tours as needed. Work with City staff and leadership to evaluate current long-range planning practices and develop strategies to optimize internal workflows and planning activity outcomes.

**Task 2. Existing Conditions and Trends**

**The City is looking for a baseline of information on existing conditions, including identification of key issues, problems and long-range goals. The City staff will provide all necessary existing materials, data and documentation. The consultant’s responsibility will be to analyze this data and document the findings, and to conduct research, outreach, etc. and production of deliverables listed below. All maps will be done within the ArcGIS Software family and will be made compatible with existing City mapping systems.**

The analysis should include but is not limited to mapping, surveys, studies, assessments and analysis of the following:

- 1) **Base Mapping**
- 2) **Regional Trends**
  - a) Population and Growth Trends.
  - b) Demographic trends.
- 3) **Land Capability Analysis**
- 4) **Existing Land Use and Development:**
  - a) Identify developable land, including infill and redevelopment.
- 5) **Neighborhoods:** Develop an official “Neighborhood and Districts” map for the City.
  - a) **Downtown:** Conduct a more granular survey and analysis of downtown Santa Fe.
- 6) **Fiscal Sustainability:**
  - a) Include a “value per acre” analysis or similar analysis.
- 7) **Urban Design**
- 8) **Transportation**
- 9) **Public and Private Utilities**
- 10) **Historical and Cultural Facilities**
- 11) **Public Safety**
- 12) **Schools**
- 13) **Parks and Recreation**
- 14) **Housing**
- 15) **Economic Development Assessment**
- 16) **Environmental Stewardship\Natural Resources**
- 17) **Institutional Structures:**
  - a) Ongoing planning efforts and their sponsor departments/jurisdictions.

**Assessment Report:** The findings of the above items will be summarized in a written (PDF format) Assessment Report. The findings will identify relevant planning issues, a summary of the findings, and policy implications for the General Plan. The report will be reviewed by the appropriate groups/committees as well as the public. It will be published on the project website where the public will be able to make comments and recommendations based on the report’s findings.

**Task 3. Digital User Platform (development and refinement to continue through all phases)**

The City seeks a web-based dynamic interface tool that will enable staff, elected officials, the public, developers and stakeholders to access a user-friendly on-line version of the General Plan. The platform will become the Planning and Development Hub for the City after the General Plan is adopted, and therefore must be accessible and updatable by City staff.

- 1) The platform must include all maps, data and studies. The maps, data and studies should take advantage of ESRI Storymaps or similar technology to be interactive and easily understood.
- 2) The platform will integrate other adopted City plans, including the plan texts and map components such as the Residential Pipeline Map, Bicycle Master Plan, the Pedestrian Master Plan, the Water Plan, etc. The General Plan components should be included as map layers so they can be overlaid with components from other plans.
- 3) The platform will include an engagement section that becomes the main hub for digital engagement for the Planning and Land Use Department.

- 4) The platform will be built in such a way that other planning projects such as the Land Development Code website and permit searches can easily be integrated.
- 5) The platform will include a backend, dashboard-style user interface that enables City staff to run reports and manage the General Plan project.
- 6) The platform will be built with translation and accessibility options that meet City engagement standards.

## **PHASE 2**

Approximately 6 months (in tandem with LDC update Phase 2)

### **Task 4. Public Engagement Plan**

The coordination and execution of community outreach and engagement cannot be understated as a crucial component to the success of this project. Based on Public Engagement Plans submitted by the Consultant, a special coordination meeting shall occur to be determined in Task 1 for the purpose of refining the General Plan so that each stakeholder consents to it and has a role in its success.

- 1) The Public Engagement Plan should include the following elements:
  - a) Inclusive meeting provisions, such as:
    - i) Food and refreshments.
    - ii) Childcare.
    - iii) Interpretation services.
    - iv) Youth-oriented activities and meetings.
    - v) Larger events may have live entertainment to attract a wider audience.
    - vi) Collaboration with community partners such as churches, schools and organizations.
  - b) Plan to recruit equity representatives to drive engagement in their community, attend public meetings, and participate in working groups/committees.
    - i) Representatives should be from an underrepresented community, such as Spanish speaking, indigenous, youth, low-income, etc.
    - ii) The Plan should recommend payment structure for equity representatives.
  - c) Review and consider Culture, History, Art, Reconciliation and Truth (CHART) outcomes.
  - d) Review and consider Midtown outreach outcomes.
- 2) The consultant should provide local engagement and Public Relations (PR) support subcontracted by the offerors.
  - a) The PR team will work directly with City of Santa Fe Communications and Public Engagement teams to develop outreach materials that meet City standards.
  - b) The Public Engagement Plan will be developed using the forthcoming City of Santa Fe Community Engagement Guide to craft all engagement materials. The City Clerk's office is expected to adopt the Engagement Guide in the coming months and will be shared with the project team at that time.
  - c) The PR team will provide all project engagement materials in both English and Spanish and meet City accessibility standards for online and in-person engagement.
  - d) The PR team will partner with local community-based organizations to conduct targeted engagement activities.

### **Task 5. Assessment Report**

Create a report on the engagement findings and identify the City's short-term and long-term needs and desires. The report should include a summary of findings from Task 2, Existing Conditions and Trends, a summary of findings from Task 4, Public Engagement, and a narrative description of the steps that should be taken to address those findings.

### **PHASE 3**

Approximately 24 months (in tandem with LDC update phase 3)

#### **Task 6. Growth Scenario Planning**

Utilizing previous tasks' analysis and engagement, the consultant will develop several future growth scenarios for future land use and development patterns. The consultant will use dynamic visualization and analysis techniques to communicate the outcomes of each scenario to the City and the public. These scenarios will be used throughout the planning draft process to demonstrate the outcomes of proposed planning policies.

#### **Task 7. General Plan Draft**

The consultant will prepare the first draft of the General Plan Update. The draft shall include analysis and recommendations for each of the topics listed below. Other than certain required sections, the General Plan may be organized in a manner that best suits the project's overall goals, the vision of the project team and the consultant's workflow as approved by City Staff.

- 1) Executive Summary (required)
- 2) Introduction, Vision & Themes
- 3) Existing Conditions and Trends
  - a) See "Task 2" above.
- 4) Assessment Report (required)
  - a) Report engagement findings and identify of the City's short-term and long-term needs and desires.
- 5) Land Use and Growth Scenarios (see "Task 6" above)
  - a) Develop the Future Land Use Map based on collaboration with Land Development Code Rewrite team and goals and objectives determined in this General Plan Update. Integrate Future Land Use Map into Digital User Platform to demonstrate the connection to other elements of the General Plan.
- 6) Regional Planning
  - a) Priorities, major projects and organizational structures.
- 7) City Character
  - a) Provide updated analysis of existing City Character, emphasizing areas of the City outside of historic overlays (Historic-area character is already well established and documented, only needs to be updated with current conditions.)
  - b) Identify desired urban form for all areas of the City, coinciding with existing neighborhood boundaries, opportunity zones, redevelopment areas, master planned areas, and other contextual information.
- 8) Sector and Special Area Planning
  - a) Identify areas for future Sector and Special Area scale planning.
  - b) Develop strategies for Special Areas places for locals in addition to tourists.

- c) Assess Special Areas at granular level including economic activity, mobility, urban design and housing.
  - d) Propose “catalyzing” City-led redevelopment projects of city owned property and Right of Way (R.O.W.) to be incorporated into sector plans.
- 9) Mobility and Accessibility
- a) Integrate goals existing plans including Multimodal Transition Plan, Bicycle/Ped/Transit Plans, Sustainability Plan.
  - b) Using recommendations from existing plans, identify quantifiable targets for transportation mode-shift.
    - i) Identify quantifiable targets for infrastructure improvements to achieve mode-shift.
  - c) Develop a “Connectivity and Street Network” map that requires future development to adhere to a street network that creates permeable, publicly accessible new development and improves connectivity in existing neighborhoods.
- 10) Infrastructure and Facilities
- a) Integrate various infrastructure and facility plans to ensure various Capital projects are optimized and not redundant.
  - b) Identify infrastructure needs and desires such as improved internet, areas to extend utilities, etc.
  - c) Using ongoing facilities evaluation, identify top priorities for new facilities and facility improvements.
  - d) Evaluate Green Infrastructure and recommend improvements.
- 11) Climate and Natural Resources
- a) Integrate relevant plans (such as water and sustainability plans) and correlate with goals and objectives of the General Plan.
- 12) Affordability and Human Services
- a) Integrate various Human Service plans such as Senior Services, Youth and Family Services, Recreation Plans.
  - b) Make recommendations for additional affordable housing tools.
  - c) Make “Affordable Living” recommendations that address other aspects of affordability beyond housing.
- 13) Development Review Guidelines
- a) Develop review processes to assess private and public development for compliance with the General Plan.
- 14) Glossary
- 15) Appendices

### **Task 8. Implementation and Administration Plan**

Develop an Implementation Plan with the following components:

- a) Provide detailed Implementation Plan that ties each recommendation to achievable goals and objectives.
  - i) Each goal/objective should include proposed cost, departmental responsibility, and timeline.

Administration Plan should include procedures for the following:

- i) Annual progress and action reports.
- ii) C.I.P. Plan update process.
- iii) 5-year reviews.

- iv) 20-year update timeline from planned adoption year.
- v) Identify 40-80+ year elements.

**Task 9. General Plan Adoption and Publication**

The consultants will work in tandem with City staff and City leadership throughout the duration of the General Plan adoption process. General Plan adoption related responsibilities include but are not limited to:

- i) Attend and present to commissions, board and the governing body.
- ii) Respond to questions from the public, City staff and leadership regarding all aspects of the General Plan Update.
- iii) Make any amendments necessary that are identified during the adoption process.
- iv) Assist with the transition to the new General Plan as necessary.

After adoption, the consultants will be responsible for the publication of the General Plan, including:

- i) Providing hard copies to the City and stakeholders if desired.
- ii) Publishing the final adopted General Plan to the project website.
- iii) Finalizing any other aspects of the project.

# CITY OF SANTA FE PLANNING & LAND USE DEPARTMENT **GENERAL PLAN UPDATE**

*TECHNICAL PROPOSAL*

RFP #24/20/P  
Revised April 22, 2024



*The City Different*



**Question today  
Imagine tomorrow  
Create for the future**

Submitted by:



## APPENDIX D Letter of Transmittal Form

**ITEMS #1 to #4 EACH MUST BE COMPLETED IN FULL (pursuant to Section II.C.29). DO NOT LEAVE ANY ITEM BLANK!** (N/A, None, Does not apply, etc. are acceptable responses.)

**RFP#: 24/20/P**

**1. Identify the following information for the submitting organization:**

|                        |  |
|------------------------|--|
| <b>Offeror Name</b>    | WSP USA Inc.   |
| <b>Mailing Address</b> | 2440 Louisiana Blvd NE, Suite 400, Albuquerque, NM 87110 |
| <b>Telephone</b>       | 505-881-5357   |
| <b>FED ID#</b>         | 11-1531569   |
| <b>NM CRS#</b>         | 01-195458-002  |

**2. 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<br>Contractually Obligate | B<br>Negotiate* | C<br>Clarify/Respond to Queries* |
|------------------|-----------------------------|-----------------|----------------------------------|
| <b>Name</b>      | Manjeet Ranu                |                 |                                  |
| <b>Title</b>     | Senior Vice President       |                 |                                  |
| <b>Email</b>     | Manjeet.Ranu@wsp.com        |                 |                                  |
| <b>Telephone</b> | 858-869-7190                |                 |                                  |

\* 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.

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

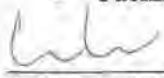
No subcontractors will be used in the performance of any resultant contract, OR  
 The following subcontractors will be used in the performance of any resultant contract:  
Leland Consulting Group; Design Workshop  
 (Attach extra sheets, as needed)

**4. 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.)**

N/A  
 (Attach extra sheets, as needed)

**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 in item #1, above, I accept the Conditions Governing the Procurement, as required in Section II.C.1. of this RFP;
- I concur that submission of our proposal constitutes acceptance of the Evaluation Factors contained in Section V of this RFP; and
- I acknowledge receipt of any and all amendments to this RFP, if any.

  
 \_\_\_\_\_ November 28, 2023  
 Authorized Signature and Date (Must be signed by the individual identified in item #2.A, above.)

November 28, 2023

Ms. Heather L. Lamboy, AICP, Assistant Director of Planning and Land Use & Procurement Manager  
c/o Central Purchasing Division  
City of Santa Fe  
PO Box 909  
Santa Fe, New Mexico 87504-0909

**Re: City of Santa Fe General Plan Update (RFP 24/20/P)**

Dear Ms. Lamboy and Selection Committee:

WSP with our team members, Design Workshop and Leland Consulting Group, are very excited to submit this proposal to support the City's update of the 1999 General Plan. We have been eagerly awaiting this opportunity, as Santa Fe is special place, home to many cultures that have influenced what it is today.

Our approach to support updating the General Plan includes these five key themes:

- **Truly Comprehensive**
- **Inclusive Engagement**
- **Impactful Innovations**
- **Future Ready**
- **Immediately Implementable**

WSP is a multidisciplinary professional services firm that understands the full spectrum of moving from notional ideas about how to organize around and respond to opportunities and issues toward successful, tangible implementation. **WSP knows how to keep plans from sitting on a shelf because WSP delivers projects**—from rapidly replacing the West Alameda culvert in Santa Fe, advising on the Santa Fe Midtown plan to delivering multi-billion-dollar infrastructure projects across the globe—**our experience and approach ensures that this will be an actionable General Plan.**

Our team of local, regional, and national experts are pleased to have this opportunity to support the City's present, do right for its future, and both respect and atone for its history.

Sincerely,



**Daniel (Dan) Baer, AICP**  
Principal-in-Charge (PIC)  
National Planning Marketing Lead



**Manjeet Ranu, AICP**  
Project Manager  
National Planning Lead  
Senior Vice President



## CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, §§ 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, § 13-1-181 or a contract that is executed may be ratified or terminated pursuant to NMSA 1978, § 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, §§ 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:**

- Mayor Alan M Webber
- Councilor Signe Lindell, Pro-tem
- Councilor Renee Villarreal
- Councilor Michael Garcia
- Councilor Carol Romero-Wirth
- Councilor Lee Garcia
- Councilor Christopher Rivera
- Councilor Amanda Chavez
- Councilor Jaime Cassutt

**DISCLOSURE OF CONTRIBUTIONS BY PROSPECTIVE CONTRACTOR:**

Contribution Made By: N/A

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

November 28, 2023  
\_\_\_\_\_  
Date

Principal-in-Charge  
\_\_\_\_\_  
Title (Position)





|          |   |    |
|----------|---|----|
| <b>A</b> | Signed Letter of Transmittal            | 1  |
| <b>B</b> | Signed Campaign Contribution Form       | 3  |
| <b>C</b> | Table of Contents                       | 6  |
| <b>D</b> | Proposal Summary                        | 7  |
| <b>E</b> | Response to Contract Terms & Conditions | 8  |
| <b>F</b> | Offeror’s Additional Terms & Conditions | 9  |
| <b>G</b> | Response to Specifications              | 10 |
|          | 1. Organizational Experience            | 10 |
|          | 2. Oral Presentation                    | 50 |
|          | 3. Mandatory Specification              | 51 |
|          | 4. Desirable Specification              | 79 |
|          | 5. Local Preference                     | 80 |
| <b>H</b> | Other Supporting Material               | 82 |

\* Our Non-Collusion Affidavit and Conflict of Interest forms can be found in the Other Supporting Material section

*Addressing Challenges with Innovative  
Design & Delivery*



## D. PROPOSAL SUMMARY

### BE GUIDED

Our approach to updating the General Plan:

- **Truly comprehensive.** A living and relevant document that is calibrated periodically.
- **Inclusive engagement.** Broad and targeted, traditional and modern approaches.
- **Impactful innovations.** A culturally and technologically smart City.
- **Future ready.** Environmentally, economically, and socially resilient.
- **Immediately implementable.** Designed to be achievable and accountable.

### BE FOCUSED

Keeping the General Plan Update on track.

- Process focused project management
- Identify key themes to develop an actionable plan
- Use milestones as stage gates to drive project progress

### BE COORDINATED

Staying coordinated with current, major City initiatives, including:

- Land development code update
- Regional partner governance
- Midtown implementation

### BE ENGAGED

Public, stakeholder, and partner engagement to add inclusive value and build consensus.

- Public engagement plan
- Online civic engagement tool
- Community partners

### BE READY

Understanding the tools necessary to achieve successful implementation.

- Position for funding opportunities
- Understand trends
- Develop organizational capacity

**We are local.** Our Santa Fe office is located on 150 Washington Ave. Suite 201, Santa Fe, NM 87501 less than two blocks away from the Santa Fe Plaza.

**We live here.** Members of our WSP team live and work in Santa Fe and we take pride in our community.

**We work here.** We have completed numerous projects in and around Santa Fe including Acequia Trail Pedestrian and Bicycle Underpass for City of Santa Fe and the NM 14 Cerrillos Road Study for the NMDOT.

### Our Experienced Team

Our proposed team, led by project manager, Manjeet Ranu, has experience and expertise in the General Plan tasks outlined in the RFP including, but not limited to:

- ✓ Administrative Coordination
- ✓ Existing Conditions
- ✓ Base Mapping
- ✓ Regional Trends
- ✓ Land Capability Analysis
- ✓ Existing Land Use and Development
- ✓ Neighborhoods
- ✓ Fiscal Sustainability
- ✓ Urban Design
- ✓ Transportation
- ✓ Public & Private Utilities
- ✓ Historical & Cultural Facilities
- ✓ Public Safety
- ✓ Schools
- ✓ Parks & Recreation
- ✓ Housing Economic Development Assessment
- ✓ Environmental Stewardship/ Natural Resources
- ✓ Institutional Structures
- ✓ Digital User Platform
- ✓ Public Engagement Plan
- ✓ Assessment Reports
- ✓ Growth Scenario Planning
- ✓ General Plan Drafting
- ✓ Implementation & Administration Plan
- ✓ Plan Adoption & Publication
- ✓ Equity & Inclusion
- ✓ Smart Cities
- ✓ Municipal Infrastructure
- ✓ Water



## E. RESPONSE TO CONTRACT TERMS & CONDITIONS

WSP USA Inc. has reviewed the sample contract provided with the RFQ and would like to submit the following changes for consideration set forth in Section II.C.15.

### WSP LEGAL EXCEPTIONS

ARTICLE/ PARAGRAPH  
OR EXHIBIT  
REFERENCE

PROPOSED CHANGES/ALTERNATE LANGUAGE FOR CONSIDERATION

#### 9. Release

Page 60

**Proposed Change:** Add, "payment" to this Article as shown for clarification.

**9. Release**

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

#### 22. Indemnification

Page 63

**Proposed Change:** Delete, "defend" in this Article as shown for clarification.

**22. 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. In the event that 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.



## F. OFFEROR'S ADDITIONAL TERMS & CONDITIONS

WSP USA Inc. requests no additional contract terms and conditions.



## G. RESPONSE TO SPECIFICATIONS

### 1. ORGANIZATIONAL EXPERIENCE

Our team has the combined General Plan project experience and qualifications to deliver the desired vision and choices for Santa Fe's future.

We have provided some relevant projects and showcased our qualified team on the following pages.

**WSP AT A GLANCE**

|   |                              |   |   |
|---|------------------------------|---|---|
|  | <b>135+</b><br>Years in U.S. |  | <b>Team with the Expertise to Deliver</b>   |
|  | <b>15,500+</b><br>Employees  |  | <b>Collaborative &amp; Experienced Team</b> |
|  | <b>300+</b><br>Offices       |  | <b>Local Santa Fe Presence</b>              |



WSP is a multidisciplinary strategy, planning, design, delivery and management consultancy that develops creative, comprehensive and sustainable solutions for a future in which society and our planet can thrive. Equipped with an intimate understanding of local intricacies, world-class talent and proactive leadership, we enable long-lasting and impactful solutions to uniquely complex opportunities and problems. WSP has offices throughout the United States and globally, including major collaborations throughout the southwest. Lead WSP staff serving Santa Fe all have substantial experience practicing in the southwest undertaking similar multidimensional work. WSP regularly undertakes similarly complex efforts with outstanding, unifying outcomes.

WSP understands the importance of the planning process, which supports navigating toward successful outcomes, with the technical and engagement work embedded in the process to inform decision-making. Investing in these processes properly and being willing to re-evaluate initial assumptions provides much better predictability for projects, stabilizing the subsequent design and delivery phases. With WSP, we bring the deep local knowledge closest to the client backed by expertise from across the company to identify potential risks early and creative solutions that allow the planning process to culminate in a decision of what should be delivered and how.



## KEY TEAMING PARTNERS

### LELAND CONSULTING GROUP

In more than 250 communities across the country, Leland Consulting Group's (LCG) strategies have resulted in built projects that immediately improve residents' quality of life: thriving downtowns, bustling shopping districts, inviting neighborhoods, and productive employment centers. **As urban strategists, LCG's role is to keep the big picture in sight, while simultaneously providing deep expertise in the strategic, market, financial, and economic elements that make projects possible and successful.** LCG recognizes that special and economically viable places result not just from one factor, but from the combination of quality design, supportive markets, developer capacity, and financial strength. During every assignment, LCG engages the public and private champions essential to rallying support and overcoming obstacles. LCG was established in 1989 and has over 34 years of experience providing real estate and urban planning services to public and private sector clients across the United States.

### DESIGNWORKSHOP

**As an international design studio, Design Workshop learned the value of building community across cultures, geographies, and economies.** Whether designing a restorative private garden, reimagining an underperforming downtown center or developing the vision for a contemporary park within a fragile ecosystem, they are committed to more than design in the conventional sense.

Design Workshop tackles challenges beyond the project site and its mapped boundaries to create places of timeless beauty and meaningful connections. Their work provides an armature for building communities by considering how people live, economies operate and environments function at a regional scale. Optimizing these systems requires large-scale thinking. Using open space as the primary organizational component, Design Workshop examines economic and transportation networks to restore urban centers, conserve the natural environment and provide equitable access to parks and open space.

## PROJECTS

### **KANSAS CITY SPIRIT PLAYBOOK COMPREHENSIVE PLAN**

*CITY OF KANSAS CITY | KANSAS CITY, MO*

Similar to the Santa Fe General Plan Update, the Kansas City Spirit Playbook was the first update to the Comprehensive Plan for a mid-size city since the 1990s. WSP focused on recommendations for key issues relevant to Santa Fe such as public transportation, affordable housing, jobs access, and multi-modal mobility, much like we did for Kansas City. Incorporating objectives, action steps, and performance measures in an interactive web-based format ensures the Kansas City Spirit Playbook is immediately implementable and that the plan can be used as a tool in daily decision-making at City Hall.

**This plan represents a departure from traditional comprehensive planning and will be organized not by siloed topic areas, but instead by broad inter-connected strategy areas dubbed visibility, mobility, livability, and serviceability.** WSP is leading the development of the mobility, livability, and serviceability elements of the plan.

The plan's objectives include recommendations on 28 issues, like public transportation, jobs access, freight and goods movement, multimodal mobility, vision zero, infrastructure, sustainability, parks and open space, public health, affordable housing, business development, and other topics. Each of the objectives include analysis and narrative describing the purpose of the objective, detailed action steps, and performance measures to track implementation of the plan.

**The WSP team coordinated public and stakeholder involvement, conducting strategy sessions that cover a wide range of topic areas of interest to neighborhood and community leaders.** These conversations have been informed by the technical, data-driven analysis of the WSP team as well as a review of plans and policies in Kansas City's peer cities. Deep stakeholder engagement took place primarily over Zoom, taking advantage of breakout discussion groups and live polling features to get informed feedback. The WSP team worked with the City to draft final plan objectives and recommendations, which were organized by strategy area, plan goal area, and traditional topics (e.g. transportation, housing, land use, etc.). These objectives will live online in an interactive web-based format to ensure that the plan can be used as a tool in daily decision-making at City Hall and for coordinating with other stakeholders. The plan recommendations will also be organized into a structured database, with references to applicable geographies, key performance indicators, and other relevant city plans and policies.



## KAY BAILEY HUTCHISON CONVENTION CENTER DALLAS (KBHCCD) MASTER PLAN

CITY OF DALLAS | DALLAS, TX

Like ongoing initiatives in Santa Fe, such as Midtown Campus redevelopment, the KBHCCD Master Plan provides a comprehensive vision for an important city district, making this much broader and inclusive than a convention center. This Master Plan focuses elements relevant to Santa Fe such as leveraging transit access for future development, multimodal transportation enhancement, and the creation of a walkable and dynamic multi-use public space.

The KBHCCD Master Plan provides a comprehensive vision for the future of the convention center and surrounding district. The Master Plan lays out a strategy to transform the facility into one of the nation's premier Convention Centers that is both compelling and competitive in the market in terms of the amount and quality of available space (exhibit, ballroom, and meeting rooms), on-site amenities, a leader in design and surrounded by a walkable, transit accessible district. The master plan considers the many investments required to achieve the plan's goals in a holistic and integrated plan.



Four critical elements of the master plan that support the transformation of the convention center are:

- **Area Plan** Leverages improved transit access to create a dynamic 30 plus acre mixed-use district around the convention center, extending the vitality and excitement from inside the convention center to the surrounding area.
- **Multimodal Station Plan** Brings together transit routes in the area to increase accessibility for the new, expanded Convention Center and serve the substantial new development in the Convention Center District.
- **Transportation Plan** Proposes enhancements to the multimodal transportation and street networks to improve access to the Convention Center and surrounding district, and to better connect the region.
- **Funding and Financing Plan** Identifies plan for implementation, funding, and financing identifies strategies that capture the value created by these investments to pay for the new Convention Center without financially impacting Dallas residents.

## **BURNHAM YARD**

### *STATE OF COLORADO P3 UNIT | DENVER, CO*

**Burnham Yard is a key historic asset located in a strategic location in Denver, similar to the varied historic and cultural assets located throughout Santa Fe.** As owner’s representative and master planner, WSP helped foster the Burnham Yard plan, which focuses on creating value to stitch together neighborhoods, achieve beneficial mobility improvements, and redevelopment while promoting responsible preservation of historic assets. All these key objectives are relevant to future development considerations in Santa Fe.



Burnham Yard was an important railyard and employment center for the Denver region, with its establishment prior to Colorado statehood. Because of its role in the development of the region and its age, potentially significant historic resources exist. In 2016, Union Pacific Railroad ended railyard operations on the property, opening the opportunity for the State to acquire the site. Since its decommissioning, it has sat underutilized despite its strategic location in central Denver.

While its location is strategic, there are many obstacles to overcome at the site. Given the history and use as a rail yard, there are significant costs for transportation and infrastructure improvements, complex environmental remediation, and costs to advance the laudable social initiatives mandated of the P3 Unit. The redevelopment plan will help guide the potential value opportunities that can be created from the site based on informed market and social equity findings to achieve beneficial mobility improvements and redevelopment. The site is long, yet narrow and constrained by freight and transit rail lines. An existing RTD light rail station presents an opportunity for equitable transit-oriented development. Proximity to the Auraria Higher Education Center is another opportunity to explore relative to the campus master plan and advancing key initiatives of the P3 Unit. Stitching together neighborhoods surrounding Burnham Yard would mitigate the decades-long impact of Interstate 25 – the Valley Highway – has had and presents an opportunity to link with natural resources and trails in the area including the South Platte River, Cherry Creek, and Lakewood Gulch.

## NEW JERSEY TRANSIT 5-YEAR CAPITAL PLAN

### NEW JERSEY TRANSIT | NEWARK, NJ

Similar to Santa Fe's goal to develop General Plan Update that is immediately implementable and guides decision making, WSP developed the NJ Transit 5-year Capital Plan to guide strategic investments. The Capital Plan reflects a comprehensive vision through an ambitious set of projects and programs that focus on key impacts relevant to Santa Fe such as comprehensive transit investments and the support of economic development and equity.



Currently, WSP is supporting NJ Transit in developing and regularly updating its 5-Year Capital Plan to guide critical strategic investments across the agency. Released in June 2020, the Capital Plan presents an unconstrained vision and ambitious set of projects and programs to provide a vastly improved experience for customers and leverage transit to build healthy, inclusive, and sustainable communities. The projects and programs included in the Capital Plan are estimated at \$5.78 billion over the next five years. Major areas of work included providing strategic support to identify comprehensive transit investments; determining how those investments could support economic development and equity; evaluating socioeconomic, planning, environmental, and operational impacts; and advising on project prioritization methods. In partnership with WSP, the content of the Capital Plan will be renewed and reprioritized regularly to reflect the emerging needs of the state and NJ Transit's customers.

## RESILIENT NJ REGIONAL RESILIENCE ADAPTATION ACTION PLAN

### NJ DEPARTMENT OF ENVIRONMENTAL PROTECTION | ATLANTIC CITY REGION, NJ

WSP is currently leading a consultant team in the development of a Regional Resilience and Adaptation Action Plan for the Atlantic County Coastal Region under the NJ Department of Environmental Protection (NJ DEP) Resilient NJ program. The U.S. Department of Housing and Urban Development (HUD)-funded regional planning project is one of four pilot regions in the Resilient NJ program, which seeks to set the precedent for how to reduce flood damages and increase physical and social resilience to climate impacts through community-based resiliency planning. **This is an example where WSP and consulting partners are tapping into a broad range of expertise to address multi-dimensional resilience challenges at the regional scale.** Developing innovative solutions over a long-term horizon is a key focus for the project and the Atlantic County Coastal Region won the Resilient NJ Innovation Competition for incorporating innovative ideas and practices into the proposed solutions to address climate vulnerabilities.



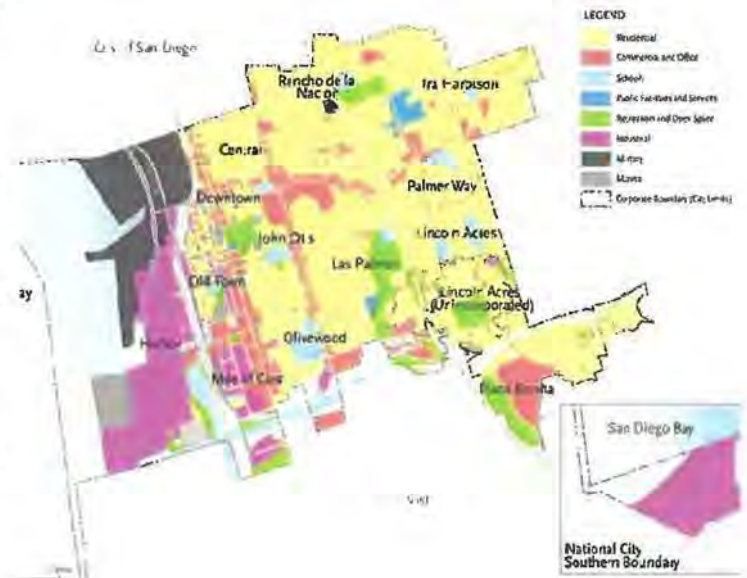
## NATIONAL CITY MUNICIPAL CODE, ZONING CODE, AND SPECIFIC PLAN UPDATES

*CITY OF NATIONAL CITY | NATIONAL CITY, CA*

Demonstrating WSP’s deep understanding of the link between updating a General Plan in coordination with a land use code, another WSP work effort in National City is more technical, requiring a working dialogue between land use and development regulations, and the General Plan to encourage the development of diverse housing in a community that sorely needs it.

The WSP team is revising the policies, regulations, and development standards in National City’s various specific plans and zoning code, such as floor-area ratios (FARs), maximum allowable heights, and parking requirements, to accelerate housing production in all income categories.

Included in this effort are the development of an ADU ordinance, updated density bonus regulations, streamlined development approval procedures, and other incentives to increase housing production. Another key component of this endeavor is the development of Objective Design Standards to streamline the development process for multi-family residential projects. The end result will be a comprehensive suite of regulatory tools and incentives to accelerate housing production in a manner consistent with the goals of National City’s Housing Element and recent state legislation.



## COMPREHENSIVE PLAN UPDATE AND DEVELOPMENT CODE REWRITE

*CITY OF ALBUQUERQUE | ALBUQUERQUE, NM*

LCG led the economic development component of Albuquerque's comprehensive plan and development code rewrite project.

**This illustrates the importance of a methodological, evidence-based approach to the planning process that will be taken for Santa Fe.** The project focused on improving both the comprehensive plan and the development code to remove barriers to development and better implement their centers and corridors policies. Developer outreach, market research, and pro forma testing of development concepts were used to ensure that the policies and goals envisioned by the community are in fact feasible and that the development code properly enables them. More specific research was focused on understanding barriers to economic development on the city's west side, where a jobs-housing imbalance has exacerbated regional transportation problems.

 LELAND CONSULTING GROUP



## LOS ALAMOS TOURISM STRATEGIC PLAN

*LOS ALAMOS COUNTY | LOS ALAMOS, NM*

Los Alamos, New Mexico is rich with history, natural beauty, and scientific discovery, and is the gateway to three National Parks. While tourists have always visited Los Alamos, the County engaged Design Workshop to create the Los Alamos Tourism Strategic Plan to help unify ongoing tourism efforts and position the County to optimize tourism economic development for the benefit of the Los Alamos and White Rock communities.

The final plan provides direction for decisions relating to tourism, community investment, cultural opportunities, and physical development. The County and its partners use the detailed action plan to direct funding and resources. Implementing the recommendations of this plan, along with other County and community initiatives, resulting in an improved visitor experience and enriched quality of life for the local community. **This project gives us firsthand knowledge of regional coordination opportunities to support the Santa Fe General Plan Update.**

DESIGNWORKSHOP





## RESUMES



PROJECT MANAGER

### MANJEET RANU

**PROJECT DIRECTOR & MANAGER,  
SENIOR VICE PRESIDENT - NATIONAL PLANNING LEAD**

27 Years of Experience

#### EDUCATION

MURP, Urban and Regional Planning, University of Colorado-Denver

MPA, Public Administration, University of Colorado-Denver

BA, Biology & Political Science, University of Colorado-Boulder

#### CERTIFICATIONS/ LICENSES/ MEMBERSHIPS

American Institute of Certified Planners

American Planning Association

Urban Land Institute: Full Member

Manjeet understands Santa Fe, having visited more than a dozen times, beginning in childhood and now providing support to the City as the Public Works Owner's Representative for Midtown. He has significant experience managing highly complex, multi-billion dollar planning projects. Interdisciplinary projects--just like the Santa Fe General Plan Update--are the heart of his passion for planning. Manjeet will be the project manager for the WSP and City team, supported by Nick Fazio, a local deputy project manager.

Manjeet Ranu is a comprehensive planning practitioner, having practiced in six high-growth, economically significant states as a land use, transportation, and environmental planner, with urban design expertise. He was an executive for three large urban transportation agencies in the Los Angeles, Salt Lake, and Atlanta regions. He also led community development for cities in the San Diego and Dallas regions. His transit experience involved leading and administering transportation planning, capital programs, Federal Transit Administration Capital Investment Grants program projects, National Environmental Policy Act and the California Environmental Quality Act. Areas of practice in land use include policy planning, master planning, development review, building safety, housing programs, preparing land use regulations, California Environmental Quality Act, and code enforcement. Manjeet's 20 years of experience in the public sector and six years in the private sector across different regions of the United States, along with years of community leadership, has given him keen strategic insights and creativity to advance highly complex initiatives to successful outcomes with broad support and equitable impact.

- Project Manager, Midtown Redevelopment Professional Services, **City of Santa Fe (NM)**
- Chief of Capital Programs, Expansion and Innovation, **Metropolitan Atlanta Rapid Transit Authority (MARTA)**
- Director of Capital Development, **Utah Transit Authority**
- Senior Executive Officer, Long Range Transportation Planning and Mobility, **Los Angeles Metro (CA)**



LOCAL DEPUTY PROJECT MANAGER  
AND PUBLIC ENGAGEMENT PLAN LEAD



**NICK FAZIO**

*DEPUTY PROJECT MANAGER - SENIOR CONSULTANT,  
URBAN PLANNER & PI SPECIALIST*

13 Years of Experience

**EDUCATION**

MUD, Urban Design,  
University of  
Colorado-Denver

BAEPD, Environmental  
Planning and Design,  
University of New  
Mexico

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

American Planning  
Association

**OTHER  
LANGUAGES**

Spanish  
(conversational)

Nick’s experience as a multidisciplinary consultant in the fields of public involvement, long-range community planning, transportation planning, and policy research and analysis gives him the background needed to support the City of Santa Fe in creating a General Plan update that is future ready. Starting his career as tribal planning intern here in New Mexico, he has led municipal long-range planning departments, served as a local Historic and Cultural Resources Preservation Officer, and served as project manager for megaproject health impact assessments. Nick’s project management experience has continued to expand, both for sophisticated public involvement and communications programs, as well as inland port plans and transportation projects. His skills as a facilitator, strategic planner, and designer enable him to effectively solve problems and advance complex communication challenges with diverse audiences. Nick has worked in both urban and rural settings across the American West, with both public and private stakeholders, and always strives to create place-based solutions that meet client needs and serve the local community.

- Public Involvement Planner, Cerrillos Road Alignment Study, NMDOT (Santa Fe, NM)
- Public Involvement Planner, NM 500 Rio Bravo Bridge Replacement, NMDOT (Albuquerque, NM)
- Public Involvement Lead, Inland Port Planning Study, Albuquerque International Sunport (NM)
- Public Involvement Specialist, Buildable Lands and Housing Needs Analysis, Klickitat County (WA)
- Public Involvement Planner, Rail Safety Study – Port of Columbia County, Columbia County (OR)



PRINCIPAL-IN-CHARGE  
AND ADVISORY SUPPORT



**DAN BAER, AICP**

*PIC, NATIONAL PLANNING MARKETING LEAD*

41 Years of Experience

**EDUCATION**

MUP, Planning, New York University  
BA, Public Policy, Pomona College

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Certified Planner: US American Planning Association  
Urban Land Institute: Full Member

Dan Baer is experienced in managing large, multidisciplinary teams for transportation and land development initiatives, including environmental impact statements, major investment studies, alternatives analyses, and master plans for major transportation and site development projects. Dan has managed the preparation of hundreds of major transportation projects and environmental assessment programs, including the analysis of zoning, socioeconomic trends, traffic and transit-related issues, air quality, and noise effects for projects across the country. He has led and organized a variety of waterfront development initiatives, including the development of design guidelines and master plans. Dan has also directed various program management efforts across the country which involved the oversight of planning, environmental, and design functions for major transportation and development initiatives.

- Project Manager, Burnham Yard Redevelopment, **City of Denver (CO)**
- Project Manager, Hudson Yards-Eastern and Western Rail Yards Master Plan and Design Guidelines, **Hudson Yards Development Corporation (New York, NY)**
- Deputy Project Manager, Master Plan, Design, and Environmental Assessment, **Port Authority Bus Terminal Replacement Program (New York, NY)**
- Project Manager, Multi-Modal Master Plan, **Kay Bailey Hutchinson Convention Center (Dallas, TX)**



ADVISORY SUPPORT



**ALASTAIR MACGREGOR, CEng, MCISBE, LEED AP**  
*SENIOR VICE PRESIDENT, NATIONAL BUSINESS LINE*  
*EXECUTIVE: PROPERTY + BUILDINGS*

24 Years of Experience

**EDUCATION**

MSc, Building Services Engineering & Management, Heriot-Watt University, Edinburgh, UK

BEng, Mechanical Engineering, Newcastle University, Newcastle, UK

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

CIBSE Chartered Engineer

LEED AP BD+C

FitWel Ambassador

Chartered Institution of Building Services Engineers

United States Green Building Council

With over 25 years in high performance design, Alastair’s expertise spans all scales, from individual net zero buildings through to strategy portfolio analysis. His portfolio includes Net Zero Carbon work for global portfolio analysis. His portfolio includes Net Zero Carbon work for global portfolios; NASA’s Net Zero, LEED Platinum “Sustainability Base”; Beijing’s LEED Platinum World Finance Center; Los Angeles’ LEED Platinum Federal Courts; the world’s first commercial Spaceport at Spaceport America; eco-city strategies for Jurong Lake eco-city, Tianjin eco-city, Marina Bay and Tanggu; and many of the world’s most sustainable sports venues including Golden1Center, Intuit Dome, Al Wakraj Stadium, and the Los Angeles 2028 Olympic bid.

Alastair’s specialist expertise includes sustainable, low carbon design and program development; LEED certification; value engineering; advanced MEP design; high performance buildings; commissioning; passive design; renewables; energy, decarbonization, and operational resiliency strategy planning; smart building and city strategies; and the development of digital solutions to drive low carbon design and strategic planning.

- Project Management, Facilities Modernization & Renovation Program, **Los Angeles Community College District (CA)**
- High-performance Buildings Team Leader and LEED Sustainability Consultant, Campus Renovation, **Children’s Institute (Los Angeles, CA)**
- Mechanical, Electrical, and Plumbing Project Manager and Lead Mechanical Design Engineer, Theatre Expansion, **His Majesty’s Theatre (Aberdeen, Scotland)**
- Mechanical, Electrical, and Plumbing Project Manager and Lead Mechanical Design Engineer, New Museum Design, **Shetland Museum & Archive (Lerwick, Scotland)**



ADVISORY SUPPORT



**SOFIA BERGER**

**SENIOR ADVISOR, NATIONAL  
TRANSPORTATION EXECUTIVE**

20 Years of Experience

**EDUCATION**

MUP, Planning, New York University  
BA, Public Policy, Pomona College

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Women's Transportation Seminar

**OTHER LANGUAGES**

Spanish (fluent)

Sophia Berger is a senior vice president serving as a leader in the United States transportation practice, particularly focused on rail and transit and public-private-partnerships. She specializes in strategic planning, project management, and project turnaround. Prior to this role, she was the division manager in Latin American and the Caribbean division for three years. In this role, she was responsible for the strategic direction of the regional operations as well as all client management, project delivery, and business development activities. In her prior role, Sophia managed the development of the company's private sector activities in Africa, where she focused on bringing the company's extensive regional infrastructure experience to new rail, road, port, mining, and energy projects under development by private sector users or funders. She has more than 15 years of infrastructure experience spanning from project management of construction projects in the field to management consulting for governmental transportation agencies around the world.

- Strategic Partner, Penn Station Master Plan, MTA, Amtrak, and NJ Transit (NJ)
- Strategic Partner, Pilot Consultancy #2, Digital and Systems Architecture, Jacksonville Transportation Authority (FL)
- Senior Engineer, Interstate 75 Design-Build-Finance-Maintain Segment 3 Project, Oakland Corridor Partners (CA)
- Strategic Partner, Resort Corridor Feasibility Study, Regional Transportation Commission of Southern Nevada (NV)

ADVISORY SUPPORT



**MICHAEL CASE, PE, LEED AP**

*SENIOR ADVISOR, ENERGY NATIONAL BUSINESS  
LINE EXECUTIVE*

20 Years of Experience

**EDUCATION**

BS, Electrical  
Engineering, Michigan  
State University

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

LEED AP: UN, 2023

Professional Engineer:  
FL, 2012 (74849); FL,  
2023; NY, 2023; NY,  
2010 (087729)

Institute Of Electrical  
& Electronic Engineers

Michael Case is the central plant and district energy lead within the U.S. energy national business line. He has more than 19 years of experience overseeing operations for the electrical and mechanical group within the U.S. energy division, including power and thermal generation, distributed generation, and energy management services for a wide range of facilities such as hospitals, university campuses, utilities, manufacturing centers, commercial and public buildings, and airports. Michael has worked on project management, scoping, planning, design, and construction management for energy infrastructure projects. He has supervised multi-million dollar contracts and delivered projects across various engineering disciplines.

- Design Lead, LaGuardia Airport Redevelopment, **LaGuardia Gateway Partners (Queens, NY)**
- PIC, New York City School MEP Services, **New York City School Construction Authority (New York, NY)**
- Electrical Engineer, Empire State Plaza Chiller Steam Turbine Replacement/Steam Compressor, **New York State Office of General Services (Albany, NY)**
- Lead Electrical Engineer, Mount Sinai Medical Center Boiler Assessment Project, **Mount Sinai Medical Center (Statewide, NY)**



BASE MAPPING  
AND DIGITAL USER PLATFORM LEAD



**ALLYSON POWERS**

*ASSISTANT VICE PRESIDENT, APPLICATION DEVELOPER*

31 Years of Experience

**EDUCATION**

BA, University of Colorado

**AWARDS**

W3 Webby Award - TIMED to Learn, 2008

PB Infrastructure Company Quality Team - Third Place, PB CommentSense, 2005

Parsons Brinckerhoff Project of the Year - Lower Manhattan Communications Plan, Parsons Brinckerhoff, 2002

Allyson Powers, a project manager for the WSP Project Visualization Technical Resource Center and a senior computer graphics specialist, is responsible for the production of interactive media and management/implementation of custom websites. She also has expertise in consulting on the implementation of CommentSense public comment management systems, including consultation and training. Allyson’s responsibilities include overseeing production design and development, needs analysis, budget development, implementation, training, deployment, quality control, programming customization, and client satisfaction. She has applied her skills to a variety of projects, including transportation, land use, urban planning, environmental management, lobbying, and education.

Allyson is knowledgeable with the Americans with Disabilities Act (ADA) guidelines and Section 508 for both state and federal programs and implements those guidelines on all projects requiring ADA compliance as it applies to online print documents and website development. She is experienced in using today’s most advanced Web tools and techniques and has a unique ability to mesh both design and simple functionality into all projects.

- Task Lead, North Carolina 2050 Statewide Transportation Plan - Interactive Tool Development, NCDOT (Statewide, NC)
- Web Project Manager, Lake Sumter Metropolitan Planning Organization 2019 On-Call, Lake County (FL)
- Web Project Manager, City of Seattle Central Waterfront Engineering Project, Waterfront Seattle (WA)
- Web Project Manager, Northeast Corridor Passenger Rail Corridor Investment Plan, New York Metropolitan, (New York, NY)



BASE MAPPING  
AND DIGITAL USER PLATFORM SUPPORT



**PATRICK KRESL**

*SENIOR GRAPHIC DESIGNER, VIDEO & USER  
EXPERIENCE DESIGNER*

28 Years of Experience

**EDUCATION**

2B2BBFA, Graphic Design, Colorado State University

3B3BBA, Speech Communications, Colorado State University

Patrick is a senior graphic designer and user interface/user experience web designer with WSP. He has designed, art directed and produced a broad spectrum of web, video, print, interactive projects, and web-based guides within the WSP's Project Visualization team by engaging the creative process to implement innovative and impactful communication. The websites he developed have implemented advanced web technologies, such as database-driven content, web-based applications that allow clients to update sites themselves, interactive maps, client-administered surveys for public feedback, and responsive design to provide an optimal user experience across a wide range of online tools and smart devices.

- Creative Director, Zero Emission Bus (ZEB) Program Introduction and All-Staff Training, **Maryland Transit Administration (MD)**
- Creative Director, Microsoft Environmental Sustainability Resources Training, **Microsoft (Global)**
- Lead Designer and Course Developer, Regional Employee Waste and Recycling Training - Online Interactive Training Course, **Washington Metropolitan Area Transit Authority (WMATA), Washington D.C.**
- Design Lead, Federal Highway Administration (FHWA) Planning and Environment Linkages - Interactive Guide, **FHWA**

BASE MAPPING  
AND DIGITAL USER PLATFORM SUPPORT



**JAY PUCKETT, GISP**

*ASSOCIATE VICE PRESIDENT, GEOSPATIAL TECHNOLOGY*

16 Years of Experience

**EDUCATION**

MPA, Public Administration,  
Syracuse University,  
Syracuse, NY

MA, Geography,  
Syracuse University,  
Syracuse, NY

BA, Geography,  
University of North Carolina,  
Chapel Hill, NC

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Geographic Information Systems  
Professional Certification

Jay Puckett is the manager of WSP's Geospatial Analysis and Visualization practice. He specializes in applying Geographic Information Systems (GIS) and geospatial technology to a variety of project types and markets across the company's portfolio. He has recent experience supporting electric transmission siting studies, infrastructure planning efforts, web application development, and information management efforts for major infrastructure development projects. Jay has experience with GIS, public involvement, web mapping development, Global Positioning Systems (GPS) data collection, IT instruction and training, and SharePoint development. Jay also has advanced training in organizational leadership and management.

- GIS Lead, Northern New York Priority Transmission Project, **New York Power Authority (NY)**
- GIS Lead and Siting Specialist, SMART Path Transmission Project, **New York Power Authority (NY)**
- GIS Technical Advisor, Baltimore County Sewer Consent Decree Program Management, **Baltimore County (MD)**



 LELAND CONSULTING GROUP



REGIONAL TRENDS,  
FISCAL SUSTAINABILITY, HOUSING,  
AND ECONOMIC DEVELOPMENT ASSESSMENT LEAD

## CHRIS ZAHAS, AICP

*LELAND CONSULTING GROUP MANAGING PRINCIPAL*

25 Years of Experience

### EDUCATION

MA of Urban and Regional Planning, Portland State University

BA, International Affairs, Lewis and Clark College

### CERTIFICATIONS/ LICENSES/ MEMBERSHIPS

AICP #019464

Chris Zahas is a real estate strategist and project manager with an emphasis on urban corridors, downtown revitalization, employment districts, transit-oriented development, and public-private partnerships. His project approach is to assist public and private sector clients in turning broad visions into prioritized and achievable action plans by combining market and economic research with strategic advice that is tied to the fundamental principles of real estate development. In all cases, Chris keeps the focus of projects on implementation, always anticipating next steps and never hesitating to advise a client to change directions when that is the best course.

In over 22 years at Leland Consulting Group, he has managed more than 35 downtown and corridor implementation strategies and played a strategic advisor role in dozens more. In the economic development realm, he brings a deep understanding of economic and demographic trends, ensuring that long-term strategies reflect the evolving drivers of how businesses choose to locate and where people choose to live. Prior to joining Leland Consulting Group, Chris coordinated economic development projects for the Portland Development Commission, Portland's redevelopment agency.

- Real Estate and Economic Development Advisor, Comprehensive Plan Update and Development Code Rewrite, Albuquerque, NM, **City of Albuquerque & Bernalillo County (NM)**
- Lead Market and Real Estate Advisor, Health District Master Plan, Coeur d'Alene, ID, **City of Coeur d'Alene (ID)**
- Senior Economic Advisor, Comprehensive Plan Update, Meridian, ID, **City of Meridian (ID)**



 LELAND CONSULTING GROUP



REGIONAL TRENDS,  
FISCAL SUSTAINABILITY, HOUSING,  
AND ECONOMIC DEVELOPMENT ASSESSMENT SUPPORT

## TED KAMP

LELAND CONSULTING GROUP SENIOR ASSOCIATE

22 Years of Experience

### EDUCATION

MA of Urban and Regional Planning, PhD coursework, University of Colorado

MS, Marketing (Consumer Behavior), University of Arizona

BA in Business Administration (with honors), University of Oklahoma

Ted Kamp provides market analysis in support of strategic land use decisions for public planners and private developers. Drawing on expertise in GIS, market economics, and demographic analysis, he incorporates user-friendly information designed to convey critical market intelligence to stakeholders. His work spans a variety of development and planning contexts including urban infill, economic development, suburban revitalization, impact analysis, and transit-oriented development. Recent client work has covered locales across the western and central US. In addition, he taught the Urban Market Analysis course for planning graduate students at the University of Colorado-Denver for five years. After receiving a BBA (with honors) from the University of Oklahoma and an MS in Marketing/Consumer Behavior from the University of Arizona, Ted provided research and strategic planning services for the Leo Burnett advertising agency in Chicago. He subsequently earned a Masters in Urban and Regional Planning (and completed PhD coursework) at the University of Colorado-Denver.

- Market Analyst, Demographic and Employment Dynamics, Comprehensive Plan Update and Development Code Rewrite, Albuquerque, NM, **City of Albuquerque & Bernalillo County (NM)**
- Demographic and Land Use Analysis, Small Area Forecasting, Comprehensive Plan Update, Auburn, WA, **City of Auburn (WA)**
- Lead Market Analyst, International Air Center Economic Feasibility Study, Roswell, NM, **City of Roswell (NM)**

LAND CAPABILITY  
AND EXISTING LAND USE DEVELOPMENT LEAD



**DAVID SCHUMACHER**

*DIGITAL SOLUTION ARCHITECT*

8 Years of Experience

**EDUCATION**

BA, Colby College,  
International Studies  
MA, Planning,  
University of Southern  
California

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

American Institute  
of Certified Planners  
(AICP) #305064

David Schumacher is a lead planner with WSP USA having more than eight years of experience. He is adept at providing planning services for multimillion-dollar initiatives, preparing feasibility studies, and alternatives analyses, and coordinating projects through the environmental review phase, with a focus on corridor studies.

- Lead Planner, Burbank Airport Station Area Plan, **City of Burbank, (CA)**
- Lead Planner, Los Angeles County Rail Network Integration Study, **LA Metro (CA)**
- Lead Planner, Westside Mobility Study and Measure M Multi-Year Subregional Program, **Southern California Association of Governments (SCAG)**
- Planner, Bristol Street Transit Corridor Study, **Orange County Transportation Authority (CA)**

URBAN DESIGN LEAD



**JOHN LOUGHRAN, AIA, AICP, PP, LEED**  
*SENIOR VICE PRESIDENT, LAND/URBAN PLANNER*  
*NATIONAL URBAN DESIGN*

30 Years of Experience

**EDUCATION**

MBA, Baruch College  
MS, Architecture,  
Catholic University of  
America

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Registered Architect:  
Washington DC, NJ, NY  
AICP  
LEED Accredited  
American Institute of  
Architects  
American Institute of  
Certified Planners  
Urban Land Institute  
Mpat (formerly  
Rail~volution),  
National Steering  
Committee

John leads WSP’s Urban Design and Placemaking Practice. He brings an expertise in urban development and master planning honed from his experience as an architect, urban designer and through his work for both public agencies and private developers. John utilizes an integrated approach to leverage transportation and other infrastructure investments to catalyze development to meet agency, developer, and community goals.

John understands the complexities of integrating mixed-use development with transportation while meeting community needs and market demands. John brings lessons learned from delivering equitable and sustainable projects across the US, with an approach that delivers a vision unique to each locality. His experience includes transformative projects such as developer’s guidelines for the overbuild above Manhattan’s Hudson Yard, a comprehensive master plan for the Dallas Convention Center and district that includes recommendations for transportation investments and a new TOD entertainment district, and Guidelines for Equitable Transit Oriented Development for the City of Raleigh.

- Urban Design Lead, Guidelines for Equitable Development Around Transit - Raleigh, NC, **North Carolina Department of Transportation (NCDOT)**
- Project Manager and Area Plan Task Lead, Kay Bailey Hutchinson Convention Center Dallas (KBHCCD) Master Plan and Transit Oriented Development Area Plan, **City of Dallas (TX)**
- Land Use Planning Lead, Feasibility Study for Land Use Master Plan at Sakonnet River Bridge Landings, Portsmouth and Tiverton, RI, **Rhode Island Turnpike and Bridge Authority (RI)**
- Project Manager, Capital Gateway Concept Plan - Hartford, CT, **City of Hartford (CT)**



DESIGNWORKSHOP



LAND CAPABILITY,  
EXISTING LAND USE DEVELOPMENT,  
AND URBAN DESIGN SUPPORT

**CHRIS GEDDES**

*DESIGN WORKSHOP PRINCIPAL*

20 Years of Experience

**EDUCATION**

MA, Urban & Regional Planning, Highest Honors, University of Colorado, Denver

BS, Civil Engineering, University of Colorado, Boulder

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

AICP #019464

Chris, a planner and urban designer, is driven by the desire to provide clients and community members a meaningful voice in the planning and design of public spaces. With over 20 years' experience, he believes that it is the responsibility of designers to draw out the desires of those who use public space, illustrate those desires in ways that all can comprehend, and engage stakeholders in a way that builds trust. Chris works on projects of all scales, from community planning to the detailed design of public spaces, and is particularly fond of projects that tackle social and physical challenges.

- Principal, Downtown Ogden Master Plan, **City of Ogden (UT)**
- Project Manager, Downtown Denver Parks & Public Spaces Master Plan, **Denver Parks and Recreation and the Downtown Denver Partnership (CO)**
- Principal, West Jordan and Midvale Station Area Plans, **West Jordan and Midvale (UT)**

DESIGNWORKSHOP



LAND CAPABILITY,  
EXISTING LAND USE DEVELOPMENT,  
AND URBAN DESIGN SUPPORT

**JESSICA GARROW**

*DESIGN WORKSHOP LAND USE PRINCIPAL*

15 Years of Experience

**EDUCATION**

Master of City and  
Regional Planning,  
Ohio State University  
Bachelor of Political  
Science, University of  
Colorado

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

AICP  
Lean Six Sigma Green  
Belt

Jessica is a community development professional with over fifteen years of experience and a proven track record of successful planning implementation and community engagement. She has effectively managed significant and complex projects and budgets, worked to craft innovative planning policies, and promoted sustainable comprehensive planning. Prior to Design Workshop, Jessica worked as a land use planner and Community Development Director for the City of Aspen. During that time, she worked on economic development plans, award-winning and broad community engagement strategies, the Comprehensive Plan and a number of overhauls to the Land Use Code.

- Principal, SLC Building Height and Pedestrian Code Revisions, **Salt Lake City (UT)**
- Principal, Ogden Downtown Land Use Code Update, **City of Ogden (UT)**
- Principal, San Miguel County East End Plan, **San Miguel County (CO)**

**TRANSPORTATION LEAD**



**MATTHEW LONG**

*VICE PRESIDENT, DIRECTOR OF PUBLIC TRANSIT & PASSENGER RAIL*

17 Years of Experience

**EDUCATION**

MA, Urban Planning  
University of Kansas  
BA, U.S. History  
University of Kansas

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Tennessee Public  
Transportation  
Association  
Colorado Association  
of Transit Agencies  
Colorado Electric  
Vehicle Coalition –  
Transit  
Denver South  
Organization  
Middle Tennessee  
Transit Alliance  
AASHTO Technical  
Assistance Program  
(MTAP) Committee  
American Public  
Transportation  
Association  
WSP Global Academy  
for Rail & Transit

Matthew is a public transit lead expert, project manager, and urban planner with more than 17 years in the transit industry. He brings national experience working with agencies and DOTs across the United States and is a passionate transit advocate and user who has dedicated his career to transit planning, funding, and operations.

Prior to joining WSP, Matthew spent many years working as a strategic planner assisting transit agencies efficiently operate fixed route, demand response, and streetcar systems. He also led the State of Tennessee public transit office responsible for administering FTA grant program funds and providing compliance oversight of urban and rural transit operators. Matthew continues to expand his transit skills and expertise at WSP with consultative leadership and focus on transit communities and development, BRT corridor and alternative analysis, and capital grant programming.

- Transportation Lead, Utah Transit Authority (UTA) Headquarters Programming & Design, UTA (Salt Lake City, UT)
- Lead Planner, Federal Transit Administration (FTA) Grant Reconciliation, Rock Region METR (Little Rock, AR)
- Deputy Project Manager, Summerhill BRT Alternative Analysis, Metropolitan Atlanta Rapid Transit (MARTA)
- Transit Service Expert, Knoxville Broadway BRT-lite Alternative Analysis, City of Knoxville (TN)



PUBLIC & PRIVATE UTILITIES,  
PUBLIC SAFETY, SCHOOLS,  
PARKS & RECREATION,  
AND ASSESSMENT REPORT LEAD



**AMY DICARLANTONIO, AICP, ENV SP, LEED AP BD+C**  
**VICE PRESIDENT, URBAN AND ENVIRONMENTAL PLANNING**

23 Years of Experience

**EDUCATION**

MSc, City Design & Social Science, The London School of Economics and Political Science

Professional development program in architecture/urban planning, Harvard University, Graduate School of Design

BA, Art History, Rutgers University

**CERTIFICATIONS/ LICENSES/ MEMBERSHIPS**

Certified Planner, American Institute of Certified Planners

LEED Accredited Professional (Building Design and Construction), Green Building Certification

Envision Sustainability Professional, Institute for Sustainable Infrastructure

American Public Transportation Association

WSP Global Academy for Rail & Transit

With more than 20 years of national and international experience, Amy DiCarlantonio has held a variety of roles including national practice lead for planning, regional manager, and program and project manager. She has a diverse portfolio of project experience spanning master planning and urban design, community resiliency, environmental planning, and federal planning for the Department of Defense. A certified planner, Amy specializes in sustainable development and incorporates forward looking strategies to enhance community resiliency in a variety of planning efforts. Much of her work has focused on the intersection of science and planning which promotes a holistic approach to planning with a specific emphasis on smart growth and community resiliency.

Amy is skilled at integrating various technical disciplines for unique planning and design projects. She has managed sustainability plans, master plans focusing on smart growth, site analyses, green infrastructure, transit-oriented development, and formulation of sustainable design guidelines and land use plans. As a LEED Accredited Professional, she also has created sustainable development frameworks that provide benchmark considerations for future environmentally responsible planning and site design work. Her background in sustainable design principles has informed her approach to resiliency planning and the crossover with emergency management. Throughout her planning career, Amy has led and supported various public participation and community outreach programs including developing programs for city and state clients.

- Project Manager, Resilient New Jersey Atlantic County Coastal Region (ACCR) - Regional Resilience and Adaptation Action Plan, **New Jersey Department of Environmental Protection (NJ)**
- Project Manager, Colorado Resiliency Framework, **Colorado Resiliency and Recovery Office (CRRO)**
- Planner, Colorado Resiliency Framework, El Paso Local Plan, **State of Colorado (CO)**



HISTORICAL & CULTURAL FACILITIES LEAD



**TED ROBERTS, M.A., RPA**  
**SENIOR ARCHAEOLOGIST**

23 Years of Experience

**EDUCATION**

BA, Anthropology,  
Wayne State  
University

MA, Anthropology  
(Archaeology),  
Northern Arizona  
University

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Registered  
Professional  
Archaeologist  
(67579909)

Secretary of the  
Interior's Professional  
Qualification  
Standards

New Mexico  
Archaeological  
Council

Archaeological Society  
of New Mexico

NM SHPO (CPRC)  
Principal Investigator/  
Project Director

Arizona Bureau of  
Land Management  
Cultural Resource  
Use Permit (CRUP),  
Principal Investigator

Ted Roberts has more than 23 years of archaeological consulting experience across all regions of the U.S., including projects in 20 states. A Secretary of Interior qualified archaeologist and historian, Ted has managed hundreds of projects ranging from small surveys and monitoring projects to multi-year data recovery efforts- all in support of clients' goals. Areas of expertise include program and project management, technical writing, and cultural/heritage resource regulatory compliance at the federal, state, and local levels.

Formerly a cultural resources practice lead in New York City and southern California, and with specialties in the archaeological and regulatory environments of the American Southwest, California (CEQA), and Southeast U.S., Ted has abundant experience with project organization, implementation, and successful completion.

- Principal Investigator, North Tank Class III Cultural Resources Survey, **New Mexico State Land Office (Socorro County, NM)**
- Principal Investigator, Cultural Resource Inventory for the Bridge Replacement Over the Rio Grande/NM 500, **NMDOT (Bernalillo County, NM)**
- Principal Investigator, Cultural Resource Inventory for the NM 31/NM 128 Roadway Improvements Project, **NMDOT (Eddy and Lea Counties, NM)**
- Project Director, Lower Taos Canyon Cultural Resource Survey, **Camino Real Ranger District, Carson National Forest, (Taos County, NM)**

HISTORICAL & CULTURAL FACILITIES LEAD



**JENNIFER HYRE**

*ENVIRONMENTAL & PUBLIC INVOLVEMENT (PI) LEAD*

22 Years of Experience

**EDUCATION**

Masters Certificate Program, NEPA, Utah State University

BS Environmental Science, Juniata College

**CERTIFICATIONS/ LICENSES/ MEMBERSHIPS**

FAA Qualified Airport Wildlife Biologist

U.S. Fish and Wildlife Service Recovery Permit for NM, AZ, NV, and CA

Wetland Delineator Certification: NM

**OTHER LANGUAGES**

French (fluent)

Jennifer has managed multiple on-call contracts throughout New Mexico and specializes in multi-disciplinary environmental compliance, permitting, and mitigation needs for local government, public works, and land development projects. She has extensive experience with high-profile public involvement, environmental clearances, and cultural resources management. Jennifer and her local team developed NMDOT's first ever Public Involvement Guide under the existing statewide engineering on-call contract. This practical resource guide for agency and consultant staff promotes consistent and thoughtful planning for public involvement during project development.

- NM 599 and Via Veteranos Intersection, NMDOT (Santa Fe, NM)
- Project Manager, Environmental On-Call - NEPA Public Involvement Guide, NMDOT (Statewide, NM)
- Environmental & PI Lead, NM 500 Rio Bravo Bridge Replacement, NMDOT (Albuquerque, NM)
- Environmental Lead, Roswell Airport Wildlife Management Plan Review, Roswell Airport (Roswell, NM)





**ENVIRONMENTAL STEWARDSHIP / NATURAL RESOURCES LEAD**

**JOANNA FRANKS**  
**SENIOR ENVIRONMENTAL PLANNER**

13 Years of Experience

**EDUCATION**

B.S., Fish, Wildlife, and Conservation Ecology; New Mexico State University

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Wetland Delineation Certification, Wetland Training Institute

Hazwoper Certified

U.S. Fish and Wildlife Service Recovery Permit for NM

Yellow Billed Cuckoo trained and certified, U.S Fish and Wildlife Service

Southwestern Willow Flycatcher trained and certified, U.S. Fish and Wildlife Service

Rio Grande Silvery Minnow Permitted (Eggs)

Joanna has a background in Fish, Wildlife, and Conservation Ecology. She has extensive knowledge in New Mexico and the species within the rivers throughout the state. She has completed various surveys for wetland delineations of the Rio Grande and Santa Fe River. Joanna has experience coordinating with the USFWS, Interstate Streams Commission and US Corps of Engineers (USACE) in New Mexico, as well as other state wildlife agencies, watershed, vegetation surveys, wetlands, federal natural resources management plans, aquatic resources, and endangered species. Her unique experience includes BIA and Section 7 consultation, biological surveys, 401/404 CWA permitting, and Section 106 and tribal consultation for the following:

- Project Manager, NM 4/BIA EA and Section 7 Consultation, Biological Services, 401/404 CWA Permitting, Section 106 and Tribal Consultation, **NMDOT & Pueblo of Jemez (NM)**
- Environmental Project Manager, Tsayatoh Road/BIA EA and Section 7 Consultation, Biological Services, 401/404 CWA Permitting, Section 106 and Tribal Consultation, **Navajo Department of Transportation (NM)**
- Environmental Project Manager, Manuelito Road/BIA EA and Section 7 Consultation, Biological Services, 401/404 CWA Permitting, Section 106 and Tribal Consultation, **Navajo Department of Transportation (NM)**
- Environmental Planner, City of Santa Fe 2020 On-Call Design Services, **City of Santa Fe (NM)**



**INSTITUTIONAL STRUCTURES LEAD**



**ERYCA DINSDALE, PE, PMP**  
*SENIOR VICE PRESIDENT, ADVISORY SERVICES*

25 Years of Experience

**EDUCATION**

BS, Civil Engineering,  
 Carnegie Mellon  
 University  
 Certificate in Public  
 Management,  
 Willamette University

**CERTIFICATIONS/  
 LICENSES/  
 MEMBERSHIPS**

Professional Engineer,  
 Oregon (84332 PE)  
 Project Management  
 Professional (30863)  
 Certified Change  
 Practitioner (Prosci)  
 Lean Six-Sigma  
 Certified

Eryca Dinsdale leads U.S. Advisory Service’s Business Transformation national practice area. She has over 20 years of infrastructure experience, specializing in business improvements that drive organizational results with actionable options, recommendations, and implementation support. She is adept at understanding and then translating Agency goals and objectives with technical requirements and solutions.

Throughout her career, Eryca led teams and organizations across the asset lifecycle – leading successful programs and transforming service delivery. Before joining the firm, Eryca held executive positions in a state department of transportation and asset management positions at a large consumer-product corporation.

- Project Manager, Organizational Assessment - San Mateo County Express Lane Joint Powers Authority (SMCEL JPA), **SMCEL JPA (CA)**
- Organizational Assessment Task Lead, State-owned Express Lanes - I-5 between Tustin and Buena Park ConOps Development, **Caltrans (Orange County)**
- Project Manager, Agency-Wide Strategic Plan Update -Vision 2028, **Los Angeles County Metropolitan Transportation Authority (CA)**
- Project Manager, Wyoming Department of Transportation (WYDOT) Road Usage Charge Study - Organizational Structure Design, **WYDOT (WY)**



INSTITUTIONAL STRUCTURES SUPPORT



**ROB DIADAMO**

*SENIOR DIRECTOR, ADVISORY SERVICES*

26 Years of Experience

**EDUCATION**

MPA, Harvard University, Kennedy School of Government  
JD, Boston University School of Law  
BA, University of Virginia

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Board of Bar Overseers, Massachusetts

Rob DiAdamo leads complex organizational and strategic planning efforts for WSP’s U.S. Advisory Service’s Business Transformation practice. As a former senior public sector executive and attorney, he achieves results in complex environments and understands the nuances of managing large, multifaceted organizations. Rob has over twenty-three years of experience in the public and private sectors focused on organizational improvements, transportation operations, and infrastructure projects, including over twelve years of leadership experience in senior policy, management, and legal positions in state government.

Prior to WSP, Rob served as the Executive Director for Commuter Rail at the Massachusetts Bay Transportation Authority, overseeing commuter rail and ferry operations. He currently teaches Local Government Law at Boston University School of Law.

- Task Lead, Hudson Bergen Light Rail Line - Procurement and Technical Documents, **New Jersey Transit (NJ)**
- Team Member, Communication Based Train Control - Interdepartmental Collaboration Plan, **New York MTA (NY)**
- Task Lead, Project Manager, Commuter Rail Service and Maintenance Assessment: Assessment of New Regional Commuter Rail Entity, **Dallas Area Rapid Transit (TX)**
- Team Member, Agency Strategic Plan Update, **Tampa Hillsborough Expressway Authority (FL)**



GROWTH SCENARIO PLANNING LEAD



**SARA KHOEINI, Ph.D.**

**LEAD DATA SCIENTIST**

13 Years of Experience

**EDUCATION**

Ph.D., Georgia  
Institute of  
Technology  
Transportation  
Systems Engineering

MS, Clemson  
University  
Transportation and  
Highway Engineering

BS, K.N.Toosi  
University of  
Technology Civil  
Engineering

**OTHER  
LANGUAGES**

Persian (fluent)

Sara Khoeini specializes in travel demand modeling and forecasting, with expertise in planning-based model applications, equity analysis, and systems dynamics. Before joining WSP, she served as an Assistant Research Professor of Transportation Systems at Arizona State University for five years. Sara obtained her Ph.D. from the Georgia Institute of Technology in Transportation Systems Engineering.

Sara has applied her travel demand model application and data analysis skills in planning projects including the San Diego plan update called Blueprint. She has also explored the application of Systems Dynamics as a data-driven scenario planning tool for Southern California. Her strong interest in equity led her to develop the Access Equity Calculator for SCAG ABM to connect accessibility-based equity evaluation to ABM systems. Beyond her professional roles, Sara is a committee member of TRB's AED20 (Urban Transportation Data and Information Systems) and actively participates in its equity group.

- Deputy Project Manager and Data Analytics Tasks Lead, Arizona Statewide Travel Demand Model (AZTDM), ADOT (AZ)
- Data Analytics Tasks Lead, Long Range Transportation Planning and Mobility, Los Angeles Metro (CA)
- Scenario Planning Task Lead, I-405 Sepulveda Pass Express Lane Feasibility Study, Los Angeles County Metropolitan Transportation Authority (CA)
- Main Analyst, Vehicle Miles Traveled (VMT) Generation Visualization and Analysis Tool, Orange County (CA)



**IMPLEMENTATION & CAPITAL PROGRAMMING LEAD**

**ALFONSO HERNANDEZ**

*ASSISTANT VICE PRESIDENT, ADVISORY SERVICES*

18 Years of Experience

**EDUCATION**

BS, Public Justice Administration, San Diego State University

Grant Writing and Management Certification, California State University, San Bernardino

Grants Management Certificate Program, Management Concepts

Alfonso Hernandez offers public sector grant experience, from pre-award to post-award, which includes grant writing, grants management and identify funding opportunities. Alfonso has worked for various government organizations at the local and regional levels. He is a subject matter expert in the field of government grant development, which includes federal, state, and local grants, and has a large portfolio of grant experience that addresses across each department for government organizations. Collectively throughout his career, Alfonso has secured more than 200 competitive grant applications in excess of \$800 million, while maintaining a high success rate.

He is also a subject matter expert in grants management and ensuring agency-wide compliance with funding requirements for each respective funded project. He has led audit and sub-recipient monitoring efforts on both sides of the audit as a reviewer and recipient, including USDOT/FTA triennial reviews and ongoing monitoring of sub-recipients.

- Project Manager, Grant Writing and Administration Services, **Pinellas County (FL)**
- National Advisory Lead, FY 2021 – FY2022 US Department of Transportation (USDOT) RAISE Grant Applications, **USDOT**
- Project Manager, Arizona Department of Transportation (ADOT) Grant Writing On-Call, **ADOT (AZ)**
- Project Manager, Grants Management and Professional Services, **Golden Gate Bridge, Highway, and Transportation District (San Francisco, CA)**

IMPLEMENTATION & CAPITAL PROGRAMMING SUPPORT



**PETER WALDT**

*DIRECTOR, COMMERCIAL PLANNING & DEVELOPMENT*

41 Years of Experience

**EDUCATION**

MS, Public Policy Analysis (Quantitative Analysis and Economic Development), University of Rochester

BA, American History (Early American Economic History)

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Region Plan Association: Member  
New Jersey Council

Peter Waldt is Senior Vice President with WSP USA Advisory Services. He leads WSP's efforts in Value Capture and Real Estate Transactions. He has significant experience in asset monetization and Transit Oriented Development transactions, particularly in creating the financial architecture of a project and land value capture. Further, he has lengthy experience in commercial lending and real estate finance, notably over 30 stadiums and arenas.

- Senior Director of Commercial Planning and Development, Non-fare Revenue Generation and Major Station Redevelopment Transactions, including Sunnyside Yard, Chicago, Baltimore, Philadelphia, New York, and Washington, DC, **Amtrak (Philadelphia, PA)**
- Director of Real Estate Development, NY Jets for the West Site Rail Yard/Stadium project and Forrest City Ratner/ Atlantic Yards project including Barclays Arena, **New York Metropolitan Transportation Authority (NY)**
- Director of Real Estate Development, Broward Commuter Rail South - Land Use and Economic Development Study, **Florida Department of Transportation (FDOT)**
- Director of Real Estate Development, Ft. Worth East Lancaster East Corridor & Subregional Study, **Texas Department of Transportation (TxDOT)**





**EQUITY & INCLUSION LEAD**

**GABI BRAZZIL**  
*SENIOR EQUITY CONSULTANT*

12 Years of Experience

**EDUCATION**

BS Communications and Sociology, University of California - Davis

Gabi Brazzil co-founded the national professional services group Equity Center of Excellence at WSP, dedicated to supporting clients in practicing and delivering equity in community and infrastructure projects. Gabi specializes in integrating equity into technical decisions and policies, with a core competency in transportation planning. Gabi's national experience guides clients in building public trust, establishing measurable equity goals, making proportionate public investments, and identifying and distributing equitable project benefits in their locale. In addition to Gabi's technical background, Gabi is also trained in DEI leadership, earning a certification from the National Diversity Council Diversity First Program.

- Equity Lead, Link 21 Planning and Engineering Services, **Bay Area Rapid Transit (Bay Area, CA)**
- Equity Lead, Complete Streets Handbook, **Bay Area Rapid Transit (City of Milwaukee, WI)**
- Contract Manager, Equity Consulting Services, **Metropolitan Transportation Commission (Bay Area, CA)**
- Project Manager, District 12 I-5 Managed Lanes, Equity Study, **Caltrans (Orange County, CA)**



EQUITY & INCLUSION SUPPORT



**SEAN SCOTT**

*SENIOR EQUITY CONSULTANT, URBAN DESIGNER*

8 Years of Experience

**EDUCATION**

MCP in City & Regional Planning, Urban Design Concentration, University of Pennsylvania

BA in Urban Studies & Music, Brown University

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

American Planning Association

Sean is a Senior Equity Consultant and Urban Designer for WSP's Equity Center of Excellence and supports WSP's national Urban Design and Placemaking practice. Sean comes from a background in urban design, planning, and community development. He understands the relationship between the built environment and its effect on social integration, and the complexities of integrating mixed-use development and public spaces with transportation infrastructure, employing a sociologic approach for a more racially just, equitable, contextual, and responsive urban landscape. Sean specializes in developing equity approaches, with a focus in urban design and planning processes that tackle underlying inequities for more equitable planning frameworks and design visions. He has national experience serving as an equity coordinator and task lead on various projects crafting project approaches through an equity lens and developing equitable urban design strategies and visions that reflect community identity.

- Equity Coordinator, Transit-Oriented Development Roles, Visioning, Viability & Tools Analysis Study, **Connecticut Regional Council of Governments (CT)**
- Equity Lead, Near-term Public Realm Concepts, **Newark Penn Station (NJ)**
- Urban Designer, Elevate Transit: Zoning for Accessibility, **Metropolitan Transportation Authority (New York, NY)**
- Urban Designer, Equitable Development Around Transit (EDAT) Study, **City of Raleigh (NC)**



SMART CITIES LEAD



**JACO CRONJE**  
**DIGITAL SOLUTION ARCHITECT**

16 Years of Experience

**EDUCATION**

Smart City Technology Design, MIT USA

BS and BE, Electrical and Computer, University of Cape Town, South Africa

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Professional Engineer (RSA)

Certified Data Centre Professional (EXIN)

PMP

IEEE, SAIEE

Engineering Council of South Africa (ECSA)

**OTHER  
LANGUAGES**

Afrikaans (fluent)

Jaco Cronje is a digital solutions architect within WSP's Innovation Advisory practice. Having joined WSP in 2008, he brings with him a wealth of international experience in the fields of electrical, renewable, and digital engineering. He has pioneered numerous technologies across Africa in the Smart Cities space as well as Residential, Retail, Commercial and Leisure environments. As a registered electrical engineer with an extensive background in business consulting, Jaco brings clients and technologies together for unparalleled synergies.

Jaco works on the development of system architectures and deployment of enterprise level digital platforms, data collection, analysis techniques, facility cybersecurity and control strategies in the built environment to find business intelligence and operational efficiencies for our clients. He brings an attentive detail to every project he touches playing an intricate role throughout the entire lifespan of our projects from the advisory stage through design to contract administration.

- Digital Solutions Architect, Smart Integrated Building Management & Data Analytics System, **San Francisco International Airport (CA)**
- Technology Lead, One Central (Landmark), **City of Chicago (IL)**
- Technology Lead, The River Mile, Smart District (by Revesco), **City of Denver (CO)**
- Smart City Lead, City of Cape Town Smart City Strategy, **City of Cape Town (South Africa)**





**MUNICIPAL INFRASTRUCTURE LEAD**

**LARISSA JAMES**  
*SENIOR VICE PRESIDENT, ASSET MANAGEMENT  
BUSINESS ADVISORY*

35 Years of Experience

**EDUCATION**

BE, James Cook  
University of North  
Queensland, Australia

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Certified Benefits  
Realization  
Practitioner  
  
Member of the Asset  
Management Council,  
Australia  
  
ISO55000 Gap  
Assessment

Larissa James has 25 years of experience in asset management consulting within several sectors including rail and airport transportation; water; electricity and gas utilities in the United States and internationally. Larissa’s experience spans the full range of asset management assignments including gap assessments, improvement plan development, and implementation within operations, maintenance, capital planning and delivery.

Prior to joining WSP, Larissa was a member of the leadership team at Aurizon Pty Ltd (AZJ). Larissa managed a team of over 30 professional staff responsible for improving operational performance through better asset management. She was responsible for implementation of the Asset Management Improvement Program, an enterprise asset management (EAM) system, asset data governance, decision support tools, strategic planning, asset investment planning, and risk management supporting both maintenance and capital delivery organizations.

- Principal, Asset Management Assessment and Improvement Plan, **Amtrak (nationwide)**
- Program Manager and Technical Director, Enterprise Asset Management (EAM) Program Business Partner Governance, **Port Authority of New York and New Jersey Enterprise Asset Management Division**
- Program Manager and Technical Director, Enterprise Asset Management (EAM) Program Business Partner Operations, **Port Authority of New York and New Jersey Enterprise Asset Management Division**
- Technical Director, Aviation Maintenance and Asset Management Best Practices, **New York/New Jersey**





MUNICIPAL INFRASTRUCTURE LEAD

**SCOTT COGAN, PE, CQM**  
*SENIOR PROJECT MANAGER & DIRECTOR OF  
TRANSPORTATION*

24 Years of Experience

**EDUCATION**

BS, Civil Engineering,  
University of Missouri

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Certified Quality  
Manager: US

Scott Cogan serves as a senior director of transportation in WSP's Kansas City, Missouri office and the civil lead for WSP's Kansas City, Lincoln, and Wichita offices. He also serves as the regional quality manager for WSP's Central Region, consisting of 13 offices around the Midwest. Scott has 20 years of design and project management experience in the civil engineering industry. He has experience in highways, bridges, municipal streets, design-build, and quality management.

- Civil Lead, Kansas City 2018 On-Call Planning Services, **Kansas City (MO)**
- Project Manager, KDOT On-call Engineering Services, **Kansas Department of Transportation (KDOT)**
- Quality Control Manager, Dallas Southern Gateway Design-build Project, **TxDOT**
- Project Manager, Interstate 49 Frontage Road Design Services, **City of Grandview (MO)**



WATER LEAD



**REBECCA BORKER, MPA**

*VICE PRESIDENT, UTILITY MANAGEMENT  
PRACTICE LEADER - WATER*

27 Years of Experience

**EDUCATION**

Watershed Hydrology  
BS, University of  
Arizona, AZ

Master Public  
Administration,  
Seattle University, WA

Lean Six Sigma  
Management Green  
Belt, University of  
Washington

Rebecca Borker is leading WSP’s Water Utility Management Consulting Practice in the Pacific Mountain West District. She is also the Branch Lead for the Pacific Northwest Branch of Institute of Asset Management – USA (IAM-USA). Rebecca is a strategic, collaborative leader and brings a wealth of knowledge and experience from working in the Public and Private Sectors. She is well-versed enhancing collaboration and partnerships with stakeholders across business lines to meet business needs. Rebecca is committed to meeting the needs of clients and the communities they serve by providing a future ready approach tailored for the client. This entails helping clients identify and address infrastructure and/or organizational issues by proposing realistic solutions that meet their current and future business needs/objectives.

- Technical Expert, Thurston County Storm, and Surface Water Utility Comprehensive Study, **Thurston County Public Works (WA)**
- Water Task Lead, Risk-Based Lifecycle Cost Alternatives Analysis, **City and County of Honolulu (HI)**
- Project Manager, Sewer Pipeline Condition Assessment Business Process, **Portland Bureau of Environmental Services (OR)**
- Quality Assurance and Control, Colorado Department of Public Health - Environment Lead and Copper Service Line Technical Assistance Program, **Colorado Department of Public Health (CO)**



## 2. ORAL PRESENTATION

WSP acknowledges and is prepared to conduct an oral presentation of our qualifications and plans if the City of Santa Fe requires.



### 3. MANDATORY SPECIFICATION

#### UNDERSTANDING & APPROACH

Santa Fe—the *City Different*—is comparatively ancient in America but its legacy goes back much further than what is classically understood to be Santa Fe’s founding by the Spanish. Indigenous peoples have lived in Santa Fe and well beyond for millennia, shaping what is today and what it can be tomorrow. Other cultures have and continue to shape the city. Santa Fe is known for its historic downtown, the Plaza, arts community, natural setting and more. During the 20th century, it also developed much like cities across the United States, with production-built suburban neighborhoods served by roads designed for the automobile and unfortunately, exclusionary practices. It is the capital of New Mexico—the oldest capital in the United States—yet its economy

is predominately tourism and government. There are vast economic disparities, a lack of attainable housing and limited mobility choices. Santa Fe is a wonderful, magical place that experiences challenges similar to many cities but its history, diversity and being Different gives it many opportunities other cities lack. An updated General Plan can help focus the community in heading toward a common vision to capitalize or create opportunities and innovatively solve challenges.

#### SANTA FE’S FY2023-24 BUDGET GOALS

- More and attainable housing
- Parks and neighborhood amenities
- Family-friendly and neighborhood focused
- Growth that is consistent with and protective of Santa Fe’s way of life
- Sustainability as a watchword of the City
- Invest in supporting the workforce, growing opportunities for all
- A better future
- Sustaining innovations
- A just Santa Fe

#### It Is Time for an Overall Update and Focusing on Strategic Areas

Much about the 1999 General Plan undoubtedly remains valid and useful, but its vintage is still 1999—all agree it’s time to comprehensively update the General Plan. Some changes will be applicable citywide. Others will focus on strategic areas due to opportunities, challenges and identified priorities. Both scales will be determined during the process—a process that WSP has designed to be highly effective in updating the plan.

#### Increasing Cultural Awareness

Santa Fe’s Culture, History, Art, Reconciliation and Truth (CHART) process was and continues to be a pivotal epoch for Santa Fe that is still playing out because there is much to do. Updating the General Plan is part of that process of atonement and meaningful, tangible change to reflect Santa Fe’s rich cultural tapestry, regardless of power and wealth. Too often General Plans focus on growth and development. Neither will be occurring across most of the developed city. A General Plan must be broader to maintain, enhance, mitigate, change, improve, and accommodate for today and tomorrow in a manner that is guided by Santa Fe.



**Diversification to Inclusively Serve Diversity, Increasing Access to Opportunity**

Like most American cities, Santa Fe needs more diversity of housing types in the right places and coordinated with more mobility choices. Both are critical, leading ingredients to increased economic diversity. No city is “built-out.” Cities are always changing and some areas are well-suited to change. Some change is needed to seize opportunities and address challenges. How that change is sustainably and equitably accomplished is a key indicator for the success of this General Plan Update. A thoughtful process, backed by technical work and engagement with deep experience is what the WSP team provides to support the City.

**Regionalism for Collaboration**

Santa Fe has far-reaching influence, from Albuquerque to Los Alamos; Taos and Espanola; many pueblos; and the County and MPO. That represents a lot of potential resources warranting stronger collaboration. The General Plan can suggest what is possible, with an implementation plan and governance framework to facilitate regionalism. Transit and housing are two examples of how a regional approach can improve quality of life and advance a more just Santa Fe.

**Stewardship, Wellbeing, and Resiliency in Harmony with the Environment**

Santa Fe sits within a dry climate that is warming and drying. This has stressed water resources in particular today, with more stresses coming with a changing climate. WSP is a leader in resiliency, sustainability, and equity because we envision, plan, design, and deliver transformational infrastructure projects—actual projects, not theories that sit on a shelf.

**A FEW THEMES IN OUR TEAM'S SCOPE OF WORK**

*Clearly Defined Process and Governance*

*Scenario Planning to Promote Consensus Building*

*Implementation to Drive Outcomes and Capital Programming*

*Digestible and Streamlined Document to Ease Everyday Usage*

*Technological Innovations Begin Now*



**INTRODUCTION TO PROPOSED ALTERNATIVE PROCESS**

The RFP offered the opportunity for proposers to illustrate critical and strategic thinking by suggesting an alternative process. **WSP is proposing an alternative process, outlined in the table below, with a crosswalk table showing the relationship between the process in the RFP.** This process is proposed to allow a progression of steps to create the building blocks that can effectively result in consensus building. By aligning to a stepwise, building blocks approach, evident stage gates are defined to establish a clear milestone with interim decision-making. Deliverables and a readiness review are aligned to these stage gates at which the Planning Commission and Governing Body will be asked to confirm readiness to advance into the next step. This process also allows the project to potentially be completed much faster—2.5 years instead of four—because of its progressive characteristics, project management rigor and alignment with the public review process. This approach can and will still be coordinated with the Land Development Code (LDC) Update. It is important that the General Plan Update be completed timely due to its vintage, urgent need for updating and to support informing the details of the LDC Update, as the LDC is an implementation tool guided by the General Plan. General Plans are higher level documents, with less detail than land use codes, so it takes less time to complete. A four-year work program risks community fatigue, evolving issues, and missed opportunities. Interim LDC regulations can be deployed, pending completion of the LDC, to ensure linkage between the updated General Plan and eventual LDC update.

| Table 1: Proposed Work Plan Steps   | CY2024 |    |    | CY2025 |    |    | CY2026 |    |    |    |    |
|---|--------|----|----|--------|----|----|--------|----|----|----|----|
|   | Q2     | Q3 | Q4 | Q1     | Q2 | Q3 | Q4     | Q1 | Q2 | Q3 | Q4 |
| <b>STEP 1</b><br>Mobilization and Understanding                                     |        |    |    |        |    |    |        |    |    |    |    |
| <b>STEP 2</b><br>Vision and Goals   |        |    |    |        |    |    |        |    |    |    |    |
| <b>STEP 3</b><br>Scenario Planning  |        |    |    |        |    |    |        |    |    |    |    |
| <b>STEP 4</b><br>Development of Preferred Plan                                      |        |    |    |        |    |    |        |    |    |    |    |
| <b>STEP 5</b><br>Work Program and Funding Plan                                      |        |    |    |        |    |    |        |    |    |    |    |
| <b>STEP → FORWARD</b><br>Governing Body Action + Implementation and Evaluation      |        |    |    |        |    |    |        |    |    |    |    |
| <b>STEP ↻ ONGOING</b><br>Administrative Coordination + Engagement and Communication |        |    |    |        |    |    |        |    |    |    |    |

| Table 2: Crosswalk to RFP Work Plan   | Phase 1                    | Phase 2            | Phase 3            |
|---|----------------------------|--------------------|--------------------|
| <b>STEP 1</b><br>Mobilization and Understanding                                     | Task 1<br>Task 2<br>Task 3 | Task 4<br>Task 5   |                    |
| <b>STEP 2</b><br>Vision and Goals   |                            |                    | Task 7             |
| <b>STEP 3</b><br>Scenario Planning  |                            |                    | Task 6             |
| <b>STEP 4</b><br>Development of Preferred Plan                                      |                            |                    | Task 7             |
| <b>STEP 5</b><br>Work Program and Funding Plan                                      |                            |                    | Task 8             |
| <b>STEP → FORWARD</b><br>Governing Body Action + Implementation and Evaluation      |                            |                    | Task 9             |
| <b>STEP ↻ ONGOING</b><br>Administrative Coordination + Engagement and Communication | Task 1                     | Task 1 +<br>Task 4 | Task 1 +<br>Task 4 |



**FOUNDATION: THE FIRST BUILDING BLOCKS ARE LAID HERE**

What’s missing and where? Who is it for and how will it help them? What are we trying to deliver and how will it be provided?

These are excellent questions the RFP posits and are critical building blocks, along with the basics that demand attention in Step 1: Mobilization and Understanding.

**STEP 1: MOBILIZATION AND UNDERSTANDING**

This step is when the project is initiated, concluding the procurement process with a notice to proceed. Every step is important to advancing the General Plan Update with consensus. This step matters because it gets the project organized; undertakes an assessment to establish its purpose, need and potential with greater specificity; and identifies early guiding themes from which to support visioning and goal-setting. Foundational building blocks resulting from this step include:

- **Project Management Plan:** the playbook for undertaking the General Plan Update, which includes the scope of work, schedule, budget, organizational chart, decision-making and more.
- **Assessment Report:** a compendium that methodically studies existing conditions, trends, and themes using an evidence-based approach and further informed by public engagement.
- **Public Engagement Plan:** sets forth the strategies and tactics for communicating, educating and engaging myriad audiences.
- **Digital User Interfaces:** internal - and external-facing digital tools to manage, communicate and engage on the project.
- **Templates:** templates that provide a common communications vernacular for consistency and quality.

The revised General Plan must bring together multiple and overlapping goals in one comprehensive plan to capture the desired vision and choices related to Santa Fe’s future. The plan will integrate transportation, housing and developments to meet community, economic, financial, and sustainability goals. To achieve the goals of the revised General Plan, we will build on past studies and plans tested against an understanding of existing conditions and analyze a full range of issues and challenges facing the City. The existing conditions and trends documented as part of this step will be the basis for an Assessment Report that will establish a baseline analysis of existing conditions. The WSP team will map and characterize existing conditions.

The **Assessment Report** will include the topics identified in the RFP and highlighted in detail herein, including from initial public engagement findings and the LDC Foundations body of work. It is important to have a clear understanding of what has already been accomplished in Santa Fe since 1999, the underlying fundamentals of the community, and how the General Plan Update can best address critical issues and opportunities. The Final Assessment Report will identify the following:

- Summary of existing conditions, trends and engagement findings,
- Identification of relevant planning issues in each subject area including issues identified through the public engagement process,
- Identification of short- and long-term needs and desires as defined by Santa Fe communities,
- Narrative description of steps that can be taken to address findings within each subject area, and
- Policy implications and recommendations for the General Plan.

The comprehensive Assessment Report will synthesize the analysis for each subject area, build upon the goals, strategies, and programs already defined, and incorporate the public engagement



input that will serve as a community atlas. As a community atlas the Assessment Report will serve as a base line of understanding and a foundation to inform Scenario Planning and the content of the General Plan Update. The policy implications and recommendations for the General Plan will be clearly defined as a chapter within the Assessment Report to ensure a clear transition between project steps and all existing conditions, trends, and engagement findings are incorporated into the General Plan Update.

**REVIEW OF PRIOR PLANS & STUDIES & EXISTING POLICIES**

As a starting point, the WSP team will review prior plans and studies provided by the client to understand the existing conditions and planning goals for the City. We will also review and summarize existing policies that will influence future growth and the feasibility of development. It will be important that the General Plan Update reflect prior decisions and public feedback rather than starting completely anew—respectful of the past and present. Based on this review and summary, we will identify opportunities, issues and summarize key findings that will be incorporated into or influence the recommendations in the General Plan Update.

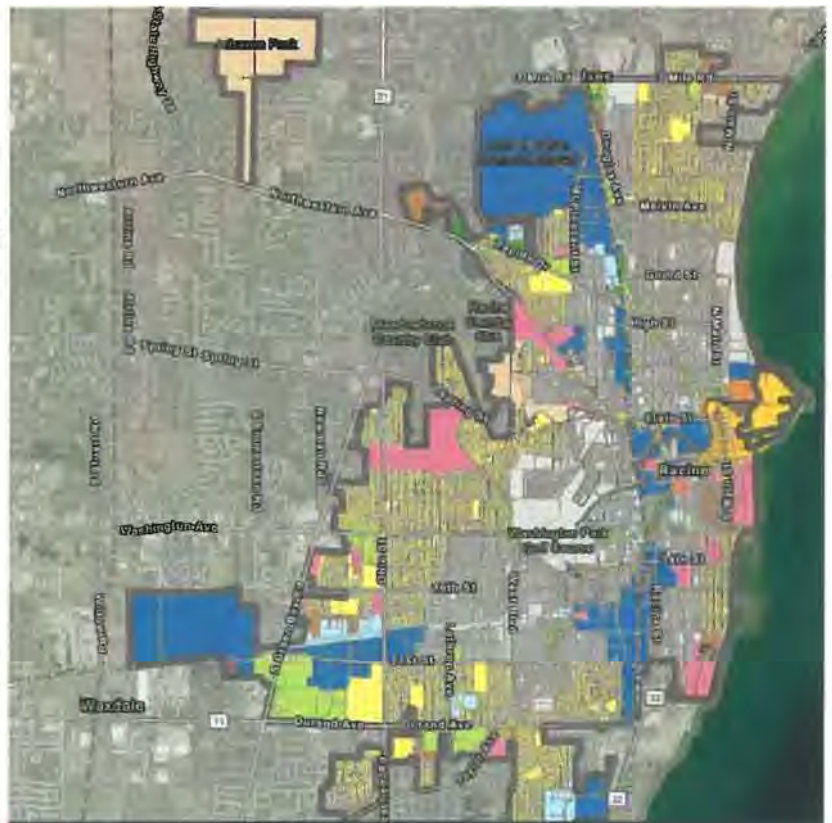
**BASE MAPPING**

A crucial first step of the effort to update the General Plan involves gathering base mapping information to facilitate an analysis of existing conditions and trends. This foundational step is essential for understanding the current state of the city's infrastructure, land use, and demographic patterns, providing a solid basis for informed decision-making in the planning process.

To initiate this endeavor, our team will integrate existing geographic information systems (GIS), satellite imagery, and

ground-level surveys (where appropriate) to create a comprehensive spatial database. GIS technology will play a crucial role in mapping and analyzing the spatial relationships among various elements, such as land use, transportation networks, public facilities, and environmental features. This comprehensive mapping effort will not only capture the static aspects of the city but will also incorporate dynamic elements, allowing for the examination of trends over time.

We will coordinate with City GIS staff to ensure the data and map templates are compatible with the City's existing GIS resources. Our team will employ ArcGIS Pro 3.x for data analysis and mapping, along with ArcGIS Online and other Esri products as needed. The robust base mapping will serve as a foundation for the existing conditions studies review and other remaining tasks.



CITY OF RACINE COMPREHENSIVE PLAN 2050  
WSP uses GIS technology to map and analyze various elements.



## REGIONAL TRENDS

An endeavor of this importance must be based on solid, factual market information so that the recommended typologies, development, preservation, and enhancement strategies are not just grounded in reality but are also credible and can be supported by a wide range of implementing partners and private investors.

We will prepare a thorough and objective citywide market analysis and forecast to ground the community conversation and visioning process and to form the basis of the resulting implementation strategy. The goal is to present a readable and engaging story of where Santa Fe has been, how it is projected to grow and change, and which external forces and trends are likely to shape its future. Information will make significant use of maps and infographics for use online, in print, and at presentations. Elements of the market and trends analysis will include:

- Mapping of existing uses and conditions
- Demographics (Census-based data) across all relevant indicators, showing historical trends and future forecasts where possible
- Real estate market conditions (rents, vacancy, absorption, etc.) for office, retail, hospitality, and residential uses
- Visitor behavior analysis (Placer.ai cell phone data)
- Post-COVID office and retail trends
- Impacts of regional, state, and national economic conditions on housing and commercial markets
- Housing demand for both rental and ownership (affordable and market rate)
- Opportunity site identification (vacant, underutilized)
- Planned/proposed projects



## LAND CAPABILITY ANALYSIS

Using data available from the City and other public sources, we will prepare a land capability analysis to guide growth scenario planning and development capacity. This analysis will inform the public about areas within the city that are well suited to accommodate growth and change, and areas that should either be avoided or require significant coordination. Data layers that we will consider include:

- Topography
- Utilities and Infrastructure
- Agricultural Lands
- Rivers and Arroyos
- Surface Hydrology
- Flood Plains
- RailRunner Stations and Transit Stops
- Santa Fe Trails Bus System
- Bikeways and Trails
- Parks and Open Space
- Annexation Areas
- Airport Clear Zones
- Historic Boundaries



WSP provided engineering design and construction services for the Acequia Trail Underpass in Santa Fe to provide safe and efficient connectivity of the Acequia Trail. Services included a Detailed Evaluation of Alternatives Study, which evaluated feasible alternatives such as bridge, underpass and at-grade crossing options, preparation of the Type Selection Report to evaluate structural alternatives and select the final structural system for the underpass, preliminary and final design, and full construction management and inspection services.

We engineered an innovative underpass structure to be constructed from the top down, incorporating prefabricated elements to speed up construction, minimize delays and disruptions to the public, and fit the design to site-specific conditions.

### EXISTING LAND USE DEVELOPMENT

Santa Fe has grown significantly since the 1999 General Plan, and an analysis of what exists today is critical to determine how much land is available for potential new development, infill, and redevelopment. Our work will include an analysis of existing land uses and development, with a focus on understanding what exists today and what opportunities might be available. We will use available GIS data on zoning and land uses to map the existing development and use patterns, with a focus on identifying potential opportunity areas. Using the mapping and an analysis of the development code, we will identify infill and redevelopment opportunities that might exist. The Existing Land Use and Development section will be a comprehensive review of all land use types and

will detail the amount and type of development that is possible under the existing adopted policies and regulations. The LDC update work products will also inform this section. We will couple this information with an understanding of the fiscal sustainability work our team is completing to provide a report that details opportunities for new development, including infill and redevelopment. This information will enable the city and community to begin to prioritize development types and locations in future engagement stages.

### NEIGHBORHOODS

Defined by character areas, land uses, key transportation corridors, and existing neighborhood associations, we will develop an official Neighborhoods and Districts map for the City. This map will consider the built form, natural characteristics, development density, the positioning of land uses and their adjacencies, and other character elements that define distinct neighborhoods of the city. The Neighborhood and District map can be a useful tool in overlaying demographic and other data to determine defined areas of need in future policy and funding scenarios.



### FISCAL SUSTAINABILITY

Our work will incorporate a fiscal sustainability strategy to ensure that the fiscal impacts of growth are captured and that proposed projects and initiatives are feasible. As with other aspects of the General Plan Update, this work is intended to be



educational and data-driven so that the visioning process is provided with objective data to inform growth alternatives.

Working closely with Santa Fe GIS and Planning staff, we will develop a baseline model to analyze various fiscal attributes of land and property throughout the city. As different attributes may be more or less useful to different parts of the planning process, we anticipate developing a flexible model that can be adjusted quickly to illustrate different fiscal dynamics. Likely attributes to be analyzed and mapped will include:

- Property value per acre (including both land and improvements), expressed as a value per acre;
- Improvement to land value ratio (to illustrate potentially redevelopable or underutilized land);
- Tax generation per parcel (incorporating tax-exempt properties) to illustrate fiscal impact to the city and other taxing jurisdictions;
- GRT and other employment-based data to understand the impact of business activity (as available from the state and aggregated to ensure confidential business activity is not disclosed);
- GIS mapping to illustrate patterns throughout the community, combined with land use, zoning, transportation, and other data layers to understand fiscal dynamics.

During Step 3, this data will further be used to enable the scenario planning to output fiscal impacts with each alternative.

## URBAN DESIGN

This analysis will focus on elements that will contribute to Santa Fe's image as a great place to live, work and play. Public elements could include street character, street lighting, view corridors, and identity enhancement elements, including landmarks and gateways. Private elements could include parking treatments, development patterns (site planning criteria), and development character (building and landscape criteria). We will

summarize the findings in an urban design analysis to understand the qualities that are unique to Santa Fe and identify the potential for placemaking. As part of this assessment our team will conduct a field visit and a visual survey. Site survey findings will be documented with maps, photographs and a short-written description.



An urban design assessment will investigate the existing built form, including the public realm, of key sectors, special planning areas, gateways, and other important districts to identify the characteristics that either support or detract from quality development, economic vitality, social vibrancy, and civic identity. This analysis will be used in public engagement to inform spatial qualities and building form that are important to the successful implementation of development types in different land use and character zones – specifically related to city character, sector, and special area planning. Items that we will catalogue in this assessment include:

- Urban forestry
- Streetscape composition (including materiality)
- Public art, lighting, and amenities
- Landscape
- Building height and scale
- Building articulation
- Plazas and civic spaces
- Utilities
- Street composition
- Natural areas and areas with potential for restoration into the natural environment

## TRANSPORTATION

Since the development of Santa Fe's General Plan in 1999, the transportation network and connectivity has drastically changed. The range of mobility options, how transportation is used, and the need for more interconnected and responsive options for moving in and around Santa Fe have changed. It is important that the city is prepared to adapt with changing transportation needs and priorities and to leverage new transportation technologies and funding programs. This will help Santa Fe expand its network of safer, more affordable, and reliable mobility options that will also increase accessibility and ensure equitable access to community services and employment.

A review of existing transportation studies and plans identified by the City of Santa Fe (multimodal transition plan, bicycle/ped/transit plans, sustainability plan), along with the MPO's recent work on complete streets, will provide WSP with a solid understanding of the community's ideas and initiatives to expand mobility choices and create a more accessible city. A matrix will be created to ensure we integrate transportation recommendations with the goals and objectives of each existing plan and study.



The Cerrillos Road project from Saint Francis to Saint Michaels is a highly constrained corridor. The WSP team used a context sensitive design approach to prepare a complete streets solution that balanced safety, multi-modal needs, economic vitality, and environmental stewardship, including stormwater management. WSP was instrumental in forming a Project Study Team consisting of NMDOT, City of Santa Fe, Santa Fe Municipal Planning Organization, and consultant members to foster a holistic view towards meeting the needs of all agencies. Multiple public meetings and significant public and agency outreach efforts were part of the WSP efforts to date.

Using available data and material from the City, an inventory of the existing network characteristics will be compiled that can include streets and roadways, transit routes and stops, rail lines and stations, and bike and pedestrian pathways. Demographic and household trends data impacting transportation conditions will also be compiled and assessed using innovative and interactive web-based mapping applications. These tools assist us to identify travel conditions and to verify current transportation deficiencies and opportunities. From this analysis, our team will identify key performance indicators and develop improvement targets for the City to measure its mode-shift progress as it implements mobility and accessibility planning recommendations.

The **Transportation section** will be a comprehensive review and assessment of the city's multimodal transportation network that will provide a baseline of information on existing transportation conditions and services, and detail the key issues, barriers toward progress, and long-range transportation goals. The report will also provide specific data analysis and recommendations that are fiscally responsible and immediately implementable.

## PUBLIC & PRIVATE UTILITIES

The General Plan Update will closely examine the intersection between growth policies and public and private utilities and services such as water, wastewater, electricity, and gas. Consistent with the 1999 General Plan themes, sustainable growth, quality of life, and affordable housing remain key considerations for the future of Santa Fe. Demand, quality, and availability of public and private utilities are primary considerations for new development and recommended growth patterns within the city. The existing conditions analysis will include a review of baseline conditions and projections to understand the availability and need for public and private utilities in different growth scenarios. Payment methods for future public and private utilities is an additional guiding consideration that will be examined. The utilities report will be comprehensive and future-focused, specifically with City of Santa Fe water, wastewater, and stormwater utilities.



Climate change and resilience are key trends related to the availability of water and energy sources in the near and short-term future. The city budget provides evidence to Santa Fe's commitment to sustainability and being at the forefront of renewable energy and forward-looking water planning including conservation and reuse. The transition to clean energy sources within New Mexico includes solar, wind, and geothermal. As detailed in the City of Santa Fe Water Storymap, climate change is expected to reduce streamflow and mountain snowpacks throughout the southwest. Since 1995, Santa Fe has had great success in reducing water demand through conservation even with a 25-percent increase in population served. Through a pro-active water management approach, Santa Fe prioritizes using surface water when available to preserve groundwater for drought conditions. Combined with the steady increase in demand through conservation, groundwater aquifers continue to recover from past practices of excessive pumping.

Today, water is provided to the city from four different surface water and groundwater sources. The existing conditions analysis will integrate key ongoing efforts within the city including the near-term 5-Year Water Conservation and Drought Management Plan and the Santa Fe Water 2100 – a long-term Water Resource Plan to provide a comprehensive view of Santa Fe's management of water resources. The intersection with other initiatives such as the Santa Fe Living River ordinance that supports the Santa Fe riparian corridor will also be documented. The Santa Fe General Plan Update will build upon past successes and develop a coordinated blueprint that reflects sustainable growth balanced with resource management.

WSP will identify all current utility providers (public/private) in Santa Fe, with an emphasis on City of Santa Fe water, wastewater, and stormwater utilities. WSP will review and compile any Utility System Plans and Public Works Capital Plans and comprehensively display/map the existing utility system area and proposed expansion and/

or improvements necessary to accommodate growth and other updated policies. The Team will identify any inconsistencies in land use and growth projections presented in the various utility plans. In addition, the WSP team will identify proposed improvements from existing utility and capital plans to accommodate the growth and anticipated project completion dates.

We want to ensure that utilities are planned for expansion and improvements by identifying utility service efficiencies and gaps between existing conditions and proposed land use and growth projects. Our team can assist Santa Fe to holistically understand opportunities associated with utility expansion/improvements for projected land use and population growth by providing recommendations for potential project improvement/expansion opportunities between utilities to provide less public disturbance and identify potential multi-benefit projects.

Our team has experience in developing utility policies that are consistent with comprehensive plan policies. We understand how to work with existing water utilities to identify any conflicts or deficiencies in comprehensive plan policies that may affect successful utility planning and also identify utility policies that can inform comprehensive plan policies.

## HISTORICAL & CULTURAL FACILITIES

Arts, culture, and historic preservation are of crucial importance to the City of Santa Fe. Santa Fe is a community that is rich in history and cultural diversity, with strong traditions and a distinctive sense of place. These elements collectively form the foundation of a unique identity. The local arts scene is a vibrant platform for creative expression, fostering a deep sense of community and driving economic development.

Historic preservation plays a vital role in maintaining the city's legacy, providing tangible connections to Santa Fe's past while shaping its character for future generations. The combined efforts in arts, culture, and historic preservation make a significant



contribution to Santa Fe’s quality of life, creating a city that is dynamic, diverse, and deeply rooted in its history. As part of our scope of work, the WSP team will undertake the following tasks:

- Collaborate with ongoing initiatives, organizations, and City and State departments to prepare a comprehensive catalogue of existing and prospective arts, cultural, and historic resources across the city;
- Participate in the process of identifying, establishing, and assessing the viability of a possible Arts & Cultural District;
- Undertake an examination and valuation of historic resources, including a thorough review of the city’s five historic districts and adjacent areas;
- Investigate and evaluate cultural, prehistoric, and paleontological resources; and
- Consider outcomes from the City’s CHART process in the development of recommendations.



## PUBLIC SAFETY

Public safety is a common thread that will inform recommendations and implementation policies in several of the General Plan Update elements. As defined in the city budget, safety is an overarching priority for Santa Fe. Multiple streams of revenue are available, including funds from the Federal

government, to invest in safety initiatives alongside social, economic development and job training, and community health programs. Our team will take a comprehensive view in developing the Public Safety section by exploring the intersection of several themes as they relates to public safety such as social programs, the environment, community health, and economic development. A desktop review of plans such as the City of Santa Fe Office of Emergency Management 2018-2022 Strategic Plan and the Hazard Mitigation Plan will lay the groundwork for an understanding of public safety goals, strategies, and initiatives that will inform the development of the Santa Fe General Plan Update. The WSP team will document existing conditions and trends by incorporating input from key community health and safety stakeholders such as Santa Fe Police Department and Fire Department, Office of Emergency Management and Community Services. Stakeholder and public input will help identify critical safety needs and opportunities of the city as a whole and needs of specific neighborhoods and communities.

## SCHOOLS

The Santa Fe Public Schools and overall education vision and direction should align with city growth strategies as they are outlined in the Sustainable Growth Management Plan and the General Plan Update. There are also several higher education institutions within the city such as private colleges and universities, public colleges and universities, and community colleges. These higher education offerings and campuses serve as important community resources and hubs but also require partnerships between the city and schools around planning topics such as quality of life, safety, housing, community concerns, and collaboration with community service organizations. Therefore, developing a **Schools section** will be critical to understanding the existing education conditions and trends within the community. The WSP team will complete a desktop review of the Santa Fe Public Schools Facilities Master Plan Update 2021-2026 to

understand recommended capital improvements and findings. For example, the Facilities Master Plan Update includes projections that indicate that excess classrooms will continue to grow over the next ten years.

Student population shifts from the north to the southwest sectors create facility demands in the south. Transfers into the older, northern schools remain high, so the schools are utilized well in the north. Traditional middle schools and high schools are underutilized, while alternative schools continue to show an increase in demand.

In addition to obtaining input from Santa Fe Public Schools, our team will also engage with higher education institutions and other alternative schools such as charter schools. The Santa Fe Public Schools (SFPS) is undertaking a Reimagining SFPS initiative that will also provide insight on important trends to consider when developing recommendations and implementation policies. The initiative has already highlighted several themes such as the need for community schools, the importance of bilingual programs, wellness, the intersection with outdoor learning and cultural programs, and transportation mobility.



## PARKS & RECREATION

A comprehensive **Parks and Recreation section** will link to several General Plan themes and existing conditions such as environmental stewardship and habitat preservation, expansion of biodiversity, arts and culture, equity, sustainable growth and provision of services, community resilience, and the role of open space within future land use and development plans. The City has over 100 existing park facilities and 170 miles of trails. The Parks and Recreation evaluation will be informed by the final Planning Area Boundary for the City's General Plan Update and the recognition that Santa Fe is home to significant landscapes throughout the County that offer a range of recreational opportunities. A desktop review of plans such as the Santa Fe County Open Space, Trails, and Parks Strategic Management Plan (2019), Open Land and Trails Plan (2000), and the Open Space Management Plans will lay the groundwork for an understanding of the existing conditions of the parks and open spaces within the broader Santa Fe region. Understanding the future goals and initiatives within the region will inform the development of the Santa Fe General Plan Update.

Over the past 20 years the Santa Fe Open Space, Trails and Parks Program (OSTP) has moved from acquisition to resource management and providing meaningful experiences for residents within the region. Santa Fe strives to be a national leader in conservation, innovative land management, and the provision of exceptional recreation opportunities. While open space conservation remains a key priority so is the importance of providing access to open spaces, trail connections, educational programming, and context-sensitive and sustainable property management. There is also the recognition that open space, parks, trails, and recreational facilities should reflect the regional needs and user patterns within Santa Fe as they are defined in four management landscapes – El Norte, El Centro, Galisteo, and Estancia.



This understanding will be overlaid with relevant themes from the Santa Fe Sustainability Plan such as enhancing the connectivity of greenbelt and habitat corridors, watersheds and parks, and stormwater management through green infrastructure. Community Plans within Santa Fe County also document goals for open space, trail connections and environmental conservation at the community scale. Several goals and strategies within the Sustainable Growth Management Plan are also linked to parks and recreation such as community-based stewardship, education and outreach related to natural and cultural resource protection, and coordination and partnership with other landowners. Collaboration is a key theme with neighboring Pueblo of Tesuque, Hyde Memorial State Park, and federal land agencies such as the Santa Fe National Forest and the Bureau of Land Management (BLM). Management of shared borders, species, habitats, and recreation impacts is emphasized in the Santa Fe National Forest Plan. The BLM Taos Resource Management Plan recognizes the need for coordination with Santa Fe on a broader landscape-scale management approach for recreational access and biodiversity since BLM property borders several Santa Fe County Open Space properties. Collectively, these concepts and trends will be outlined in the Parks and Recreation analysis to inform the General Plan Update and provide a comprehensive and balanced approach to recreational needs and opportunities, future land development and landscape conservation.

## HOUSING

LCG prepares analyses to support community housing elements as part of general and comprehensive plans for communities across the U.S. More recently, in response to the housing affordability crisis, this work has expanded to include housing action plans, which expand upon the assessment of existing conditions and needs to include strategies to encourage housing production, a broader diversity of housing types, and affordability that better matches the incomes of area residents and workers.

As part of this task, LCG will complete the following:

- Analyze population and employment trends, with documentation of projections.
- Quantify existing and projected housing needs for all income levels, including extremely low-income households, with documentation of housing and household characteristics, and cost-burdened households.
- Collect data on type, size, cost, and age of housing in the city. Collect data on rental properties (e.g., type, size, cost, and age) and percentage of housing stock.
- Review and evaluate the current housing element and other policies regarding housing, including an evaluation of success in attaining planned housing types and units, achievement of goals and policies, and implementation of the schedule of programs and actions.
- Review the effectiveness of current programs, development regulations and permitting processes related to housing development.
- Review land capacity analysis and ability of existing zoning to provide for housing needs and all income brackets.
- Identify areas that may be at higher risk of displacement from market forces.
- Conduct research and assemble findings following the most current New Mexico legislative policies related to housing.

## ECONOMIC DEVELOPMENT ASSESSMENT

Our partner, LCG, understands development economics and the market realities of economic prosperity. Whether operating at the citywide level or addressing downtown Santa Fe or a specific neighborhood, we will ensure that goals and policies pertaining to housing and economic development are implementable and feasible. Our analysis will specifically address issues that are relevant to Santa Fe given its role as a state capital and tourist destination.



These issues include:

- Preserving and enhancing Santa Fe’s cultural authenticity while capturing economic opportunities to provide family wage jobs to its residents;
- Enhancing and sustaining the downtown as a community amenity and economic driver;
- Nimble navigating rapidly changing economic trends in ecommerce and industrial development to maximize job and investment opportunities;
- Understanding the role that affordable housing plays in maintaining an economically competitive city; and
- Other issues and strategies that emerge from the community visioning process.

As with the population and demographic trends analysis completed earlier, we will prepare a thorough baseline data set that tells the story of Santa Fe’s current economy, where it has been, and

where its future opportunities lie. This work will include a detailed assessment of:

- Employment trends;
- Major industries and employers;
- Key opportunities for job creation and growth;
- Key indicators such as education, wages, unemployment, industry clusters, and other data points; and
- Emerging trends that impact economic vitality such as the rise of ecommerce, demand for warehousing and distribution, work-from-home impacts on office demand, and the role that housing unaffordability plays on business recruitment and success.

## ENVIRONMENT STEWARDSHIP/ NATURAL RESOURCES

Santa Fe’s General Plan developed in 1999 supports the overall message of Natural Resource Conservation of the time, however, in 2023 these ideas have evolved and grown. The City of Santa Fe is an environmentally friendly community, and it is imperative that the city is prepared to adapt to the protection and conservation of biological and natural resources, visual resources, natural landscapes, and landmarks. Doing so will aid the City of Santa Fe to be more environmentally conservative and conscious. Biological and habitat conservation has grown, with our ever-evolving world, to include permitting, management, and mitigation of natural resources, clean waters, visual and sound responses, threatened and endangered species, air quality, and how the public is responding to these changing challenges.

A review of existing natural resource management, conservation policies and plans identified by the City of Santa Fe (quality of life and sustainable growth) will provide WSP with a solid base of the community’s ideas and initiatives to expand the growth of environmental stewardship and natural resources management.

A review of the existing general plan, existing natural resources management, and conservation policies will allow WSP to advance a new City of Santa Fe General Plan that is constructed around the habitat and biological communities within Santa Fe. The new plan will allow Santa Fe to lessen their development impacts to biological and cultural resources.



This section of the Assessment Report will be a comprehensive review and assessment of the city's environmental community that will provide a baseline of information on existing natural resources habitats, communities, wetlands, land use and use those concepts to create a centralized general plan with the modern practices and policies. The Report will also provide specific data analysis and recommendations that are fiscally responsible and immediately implementable.

 **SMART CITY VALUE-ADD**

WSP's Smart-City technology team will participate in city planning charrettes and lead all technology and data-driven conversations to help in WSP's understanding of existing conditions. This helps us to develop future integration opportunities which enhance resident experiences and operational efficiencies for the City.

The goal of these charrettes is to understand current operations, dataflows, ownership of data, identification of operational data, process pain points, shortcomings of data management/ collection, and future goals for data sharing, integrations, and information access.

For the Assessment Report, WSP's Smart City Team aims to clearly outline, through charrette outcomes, the opportunity data presents to the City. Outcomes dependent, we expect to present the City's desired improvements in data quality and the potential information sharing practices have for the City in terms of automation efficiencies.

This will begin with a distillation of charrette results and a review of existing documentation, including select City plans listed in the RFP. Further to the workshops, the WSP Smart City Team will request the following documents in its review of City documentation as well: City Data Management Policies, IT infrastructure documentation, cybersecurity policies, smart city initiatives, and the City network architecture, if these exist. **Altogether, the charrettes and documentation review will provide a foundational understanding into workflows, challenges, and needs.**

Based on this understanding, our team will summarize the data collection methods and information sharing landscape to outline the specific strengths and opportunities in the existing City organization. By further delving into data security measures required for compliance and ongoing smart city initiatives, the assessment will capture a holistic picture of the City's current technological and operational state.

This summary will become an assessment of current gaps in data collection practices, information sharing protocols, and the level of automation in department workflows. The gap analysis will identify areas requiring improvement, setting the stage for strategic recommendations aligned with the City's overarching goals in modernizing its General Plan Update.



Importantly, the Assessment Report will begin to answer the pivotal question posed by the City: **“What’s missing & where?”**

Ultimately, the Assessment Report serves as a valuable guide for targeted enhancements across the City’s data sharing and information access landscape.

### **MUNICIPAL INFRASTRUCTURE & ASSETS**

WSP showcases its proficiency in municipal infrastructure through a comprehensive approach to asset management programs. In response to the evolving demands on urban infrastructure in rapidly growing cities, we collaborate with municipal agencies to conduct thorough asset management maturity assessments and formulate strategic directions for enhancing their asset management programs.



WSP’s capabilities extend to the development of maturity assessment reports, synthesizing key findings and proposing improvement actions based on stakeholder consultations. The firm plays a pivotal role in crafting asset management improvement roadmaps, outlining high-priority initiatives for implementation over the short and long term. These roadmaps include detailed work plans for prioritized initiatives and overarching schedules for their phased implementation.

A significant aspect of our expertise lies in establishing Strategic Asset Management Plans, providing clear guidance for municipal agencies, and steering the evolution of their asset management programs. Additionally, our team facilitates strategy and visioning sessions, fostering discussions on

current asset management drivers, defining goals and objectives, and delineating long-term desired outcomes.

The outcomes and benefits of our collaborations are transformative. They lead to a cohesive understanding of asset management visions, goals, and objectives across organizations, aligning strategic goals with asset management activities. This approach enhances accountability and transparency in decision-making, ensuring the responsible and sustainable allocation of resources.

Our contributions lead to the establishment of clear roles and responsibilities within asset management programs, fostering engagement and ownership of activities, and promoting a culture of collaboration and consistency. The projects contribute to increased consistency in how assets are managed, enabling systematic evaluations of asset conditions and needs.

Our team’s expertise in municipal infrastructure shines through its collaborative efforts, demonstrating a commitment to advancing asset management practices, optimizing resource allocation, and fostering a culture of accountability and collaboration for the benefit of urban communities facing rapid growth.

### **INSTITUTIONAL STRUCTURES**

The new plan must foster regional collaboration, represent a wide and diverse-cross section of residents and be ready to be implemented to address the challenges the Santa Fe region faces today and may face tomorrow. The updated plan needs to foster collaboration among all of the parties who are under its umbrella – both its regional partners and internal agencies and departments. It should make the region’s goals and vision - and the corresponding projects that would flow from those goals and visions -- so clear, understandable, and actionable that Santa Fe will become a stronger candidate for many of the discretionary federal funding programs that are flowing from the recently passed infrastructure and climate bills.

However, a plan is really just paper on the shelf unless the parties responsible for making it a reality have agreed to the overarching goals; a clear



delineation of roles and responsibilities; and there is agreement about how decisions will be made. We know that Santa Fe is looking for a plan that can – in practical and real-world terms – address the community’s challenges. Therefore, we believe that it is essential to develop buy-in and get the processes right on the front-end – it is better to take the time to define goals and objectives so there is clear understanding of where the process needs to go than to start searching for solutions that do not necessarily meet the ultimate goals of the city. We look forward to working with Santa Fe and its partners and stakeholders on a process that guides the development of the General Plan update and improves collaboration and decision making among the regional entities who are crucial to the city’s success and within the internal agencies and departments who are responsible for the development and delivery of the city’s plans and programs.

First, the key regional players and stakeholders must be brought together to agree upon a shared vision and goals that will inform their collaborative regional approach to problems. Solutions rarely end at convenient political boundaries, and we need to ensure that the region is working in a unified manner to set goals and priorities. As part of the process, we could also explore current decision-making structures and recommend improvements or enhancements as appropriate. We will work with the Santa Fe Project Manager to identify the key stakeholders, but recognize that this should include local, regional, state, and federal agencies who are essential to delivering funding and projects.

Second, it is also essential that all relevant Santa Fe agencies and departments are also working from a common understanding to ensure that the vision is at the forefront and remains implementable and actionable. There are various key departments, such as Public Utilities, Public Works, Community and Economic Development, and Community Health and Safety that have a role in determining which projects can and should move forward in the city. We want to work with the departments to make sure that from a capital planning and programming perspective, there is a common agreement with and appreciation of the goals of the process, so that everyone understands

the direction that the city wants to go in and decisions are made through that lens.

Third, developing a governance model is not just an end-product to be used, there needs to be a process to manage the actual preparation of the update to the General Plan.

- How will decisions be made?
- How will competing interests be prioritized?
- How will voices be heard and decisions be made?

As part of the process, we will partner with Santa Fe to ensure an inclusive process that delivers an updated General Plan that meets the goals of the community and can then be acted upon.

### **DIGITAL USER PLATFORM**

WSP proposes the development of a digital spatial platform to be the main gateway for stakeholders and the public to access mapping related information from the General Plan Update. Additionally, the platform will feature a dedicated engagement section (sometimes referred to as online civic engagement), strategically positioned as the hub for digital interactions related to the Planning Department. This section will facilitate public input, and surveys, fostering a sense of community involvement in the planning process. The integration of interactive tools, such as mapping widgets and comment features, will enable users to provide feedback directly on the platform, ensuring a more inclusive and participatory approach to city planning. The primary objective is to streamline access to key spatial information, enhance communication, and promote transparency.

The heart of this solution lies in the development of a user-friendly online portal that serves as the digital gateway to the General Plan. Leveraging Esri’s cutting-edge GIS capabilities, our platform will provide an intuitive and visually engaging interface for users to explore the General Plan in a spatial context. Users, including city staff, stakeholders, and the public, will have the ability to navigate through different layers of information, accessing key details related to land use, infrastructure, and socio-economic data.



**PLATFORM ARCHITECTURE**

The platform will be built using an ArcGIS Hub Site connected to the city’s existing ArcGIS Online or Portal instance. This setup will allow the city to share web maps and applications highlighting key aspects of the GPU and other planning related data along with a mechanism to share spatial datasets with stakeholders. Key aspects of the development of the Hub site include the creation of the hub site itself, a web mapping application to view the GPU and other spatial data layers, and a data portal for users to access and download specific data layers from the city. This innovative platform aims to enhance transparency, collaboration, and engagement among staff, stakeholders, and the public, while providing robust backend capabilities for efficient management by the Planning Department. On the backend, our proposed solution includes a robust, ArcGIS Dashboard designed specifically for City staff. This interface will empower staff members to run reports, analyze engagement data, and manage the platform efficiently. The backend system will be equipped with advanced reporting tools, data visualization capabilities, and user management features to streamline administrative tasks and enhance the overall effectiveness of the Planning Department’s operations. To achieve this, WSP will undertake key tasks:

**PRELIMINARY DATA AND SYSTEM ASSESSMENT**

First, an in-depth assessment of the existing system will be conducted to evaluate the current infrastructure, spatial datasets, stakeholder needs, and future goals of the site. Included in this assessment will be determining how existing city datasets will be migrated into the platform at the parcel level. Collaborating closely with the planning department, WSP will gather requirements and define clear goals for the Hub site. The process will involve interviews with planning department staff and benchmarking against industry best practices. Based on the assessment, WSP will gain insights into the department’s unique needs.

**STRATEGIC ROADMAP**

Following the needs assessment, WSP will create a strategic, phased roadmap for the Hub site and

spatial data management within the department. This roadmap will guide the development of key data layers and the Hub site, ensuring that the GIS system is developed in a way that provides lasting value to the city and supports its long-term vision for developing and sharing planning related spatial data, within the budget available for the General Plan Update.

**DEVELOPMENT OF THE HUB SITE AND MAPPING APPLICATIONS**

Next, the design and development process will commence, ensuring that the site is user-friendly, secure, and efficient. Regular communication with department staff will be key to ensuring development is responsive to evolving needs. By establishing this central portal, both city staff and the public will benefit from improved access to essential information, fostering a more informed and engaged community.

Several of the maps currently available on the city’s GIS Services and Products website could be combined into a parcel and zoning application, which would give members of the public a single-stop application for viewing essential property details such as the situs address, Assessor’s Parcel Number (APN), assessed value, zoning classification, land use information, planning zone updates, and demographics based on Esri Tapestry Segmentation data. Customized pop-ups will contain links to the city’s other information systems, such as tax cards or assessor’s databases as appropriate. The aim of this application is to enhance efficiency and improve public interactions with parcel and zoning related data.

**DATA UPDATE AND LINKING**

The development of a Hub site and primary mapping application are only useful insofar as the underlying data is of high quality and is kept current. To achieve this, several key actions will be taken. First, WSP will review existing workflows to make sure that the data layers feeding the applications are maintained and current. This will be done in a way that minimizes disruptions to the city’s existing workflows by automating data transfers or data enrichment as much as possible.

Second, integrating data from different sources is crucial for maintaining consistency. WSP will design



mechanisms to synchronize parcel and zoning data seamlessly. For example, when a property undergoes rezoning, the app will reflect this change promptly within the attributes of the parcel data and/or web application popups related to a given parcel. Similarly, any modifications to parcel boundaries or land use classifications will be synchronized across relevant systems to the extent feasible.

Third, quality assurance measures will be implemented to validate the accuracy of updated data. This includes cross-referencing information with official records, conducting spot checks, and flagging discrepancies promptly. The goal is to provide reliable data to city staff, developers, and the public, ensuring informed decision-making.

Finally, WSP will explore opportunities to link related datasets beyond parcel and zoning data. For instance, integrating property tax records with parcel information can enhance financial planning and revenue forecasting. Similarly, connecting zoning data with environmental factors (e.g., flood zones, soil quality) can inform land use decisions. By prioritizing data accuracy, synchronization, and integration, WSP aims to create a robust foundation for future applications and informed urban planning within the City of Santa Fe.

**EXPAND FOR ADDITIONAL APPS IN THE FUTURE**

WSP recognizes the need for scalability and adaptability in the City of Santa Fe’s digital infrastructure. To prepare for future applications, WSP proposes that the Hub site be designed with flexibility in mind. Its architecture will allow for seamless integration of new mapping applications and features. By utilizing an ArcGIS Hub site and the city’s existing ArcGIS Online and/or Portal instances the site can accommodate diverse functionalities without locking the city into the use of custom applications. Additional applications or sections of the Hub site can be introduced as needed to expand functionality and address new audiences. By adopting these principles, WSP aims to create a future-ready digital ecosystem that supports the City of Santa Fe’s growth and enhances public services. By combining Esri technology with a user-centric design and comprehensive backend functionality,

our proposed digital platform is poised to elevate the city’s planning process, making it more accessible, engaging, and efficient for all stakeholders involved.

**PUBLIC ENGAGEMENT PLAN**

From our staff’s participation in community organizations to our planning and design work, WSP has built strong connections with small businesses and community relationships over the many years we have worked in and around Santa Fe.

Our team’s approach seeks to incorporate community voices throughout the planning process to develop a vision that strives for equitable and sustainable policy choices that result in a vibrant and vital future for Santa Fe. As a local firm and with our communications and public involvement lead living and working in nearby Albuquerque, WSP is deeply invested in New Mexico communities, including Santa Fe and its diverse neighborhoods. Our team’s approach is inclusive, imaginative, interactive, and centered on building relationships with community partners (CBOs). Our approach focuses on forming neighborhood-specific engagement efforts to put community first and elevate the voices of those historically underserved or excluded from planning processes. To truly co-create a general plan with the community, we will complete the following steps, which are further defined in the subtasks that follow:

- Prepare a Public Engagement Plan and equity strategy that outlines open, transparent, and multi-path communication to engage equity-priority communities, key interested parties, and the broader community.
- Include equity throughout the process by working with the community to develop an equity analysis. Establishing equity goals will help guide the planning process and support equitable outcomes.
- Form a network of compensated Community Partners to lead neighborhood-specific engagement approaches.
- Develop a project-specific brand identity and communications materials, including creating a Social Pinpoint Hub to advance the City’s engagement efforts.
- Engage the broader community through



visioning workshops, events, and community conversations.

- Prepare a community engagement and involvement/lessons learned summary and accountability matrix that captures all comments, evaluations, lessons learned, and input throughout the process. This will contribute to the City’s future efforts and support long-term capacity building.

### COMMUNITY PARTNERS

A key aspect of our engagement approach is developing relationships with Community Partners to provide consistent and meaningful input through all stages of the planning process. To identify the Community Partners, we will focus on the neighborhoods and districts identified and outlined in Step 1. Community Partners will be considered based on an examination of the existing neighborhood associations and networks, community-based organizations operating on the ground, potential growth areas, and the need to include voices that have historically been excluded from planning processes. We anticipate approximately ten to fifteen Community Partners being identified to help the project team better pinpoint distinct community characteristics and challenges from a grassroots level. Working with Community Partners who understand the Santa Fe tradition and historical and current challenges of neighborhoods will aid in recruiting members, including equity representatives, to participate.

Community Partners will be selected and compensated (compensation to be determined based on PEP and is funded separately of this project budget) based on their relationships and ability to represent and engage equity-priority communities and elevate their voices. The Community Partner selection process and compensation plan will be defined with the City at Project Kickoff in Step 1.



With the support of the public engagement team lead, the Community Partners will be responsible for leading outreach meetings or events, framed as “Community Conversations,” in each of the neighborhoods. The Community Partners will help ensure communication materials are written in layperson’s terms, use language and graphical communication appropriate to the audience, and meet the City’s standards.

With the help of the Community Partners, we will seek perspectives that represent diverse interests and groups such as:

- Modes of transportation (pedestrian, ADA interests, bicycle, public transit, freight, automobile)
- BIPOC communities and businesses
- Social justice
- Neighborhood associations
- Economic development
- Arts and culture
- Urban design
- Environmental quality
- Housing groups and organizations
- Youth, LGBTQ+, and elder perspectives
- Accessibility and disability inclusivity

### INTEGRATING EQUITY

To enhance our approach to existing conditions, the equity team will identify equity focused communities in Santa Fe and assess their baseline, the distance between their baseline and vision, and the priorities of their vision. We understand that equity communities often experience underrepresentation, underinvestment, being overburdened, and less resiliency to neighborhood change, and the legacy impacts of these experience may lead to a different baseline, vision, and priorities than greater Santa Fe. We also recognize the value of culture, economic contributions, diversity of thought, and other characteristics that define equity communities beyond disparities or disadvantages. First, we will review local resources provided by City Staff and conduct our own research to produce an equity analysis that identifies equity communities. This includes a quantitative element like data indicators, using tools like USDOT Transit Disadvantaged

Communities and the Climate and Economic Justice Screening, and a qualitative element that summarizes local historical context that contributed to existing conditions, and public input on their lived experiences with current infrastructure, and related programs, and policies.

The equity team will collaborate with the public engagement team to leverage the equity analysis and the requested Neighborhoods and Districts Map to inform a neighborhood-level public engagement plan. Neighborhood-level public engagement will capture insight specifically from equity communities to develop a Neighborhood Equitable Vision & Needs Assessment. Inclusive public engagement and meeting people where they are will allow us to empower and amplify diverse voices, including the Asian, Black, Hispanic, Spanish, and Native communities, as well as Santa Fe's thriving arts community. The assessment will address key areas of quality of life including housing, economic development, transportation, public safety, parks and recreation, and other themes consistent with the broader existing conditions work. The input will be organized into near, mid, and long-term goals so the City can plan for quick wins and long-term commitments that will build public trust.

Based on community conversations and our own research, the equity team will develop a community assets map layer that can be overlaid on the Neighborhoods and Districts Map. Community assets can include places of worship, green spaces, community centers, public art, libraries, health care facilities, and more that offer sense of belonging, livability, and comfort. Mapping community assets can identify places and spaces to preserve and show gaps in these offerings in some neighborhoods compared to others. The City can use this data to support development without displacement, create connected infrastructure leveraging existing nodes, and prioritize funding.

The equity team will play an advisory role in public engagement. For example, the equity analysis will

allow us to set a goal for representative participation in public engagement based on the diversity in the Santa Fe. This will help set a success metric beyond the volume of engagement efforts. The equity team will make recommendations of community leaders and organizations that represent equity communities and guide the structure for their compensation. They will also coordinate with the technical team on what content to share with the community, a format for that content that is equitably understood, and follow-up post-event to ensure input is used in refinement and decision-making.

Building an equitable, comprehensive plan requires more than just looking at maps and data. To truly plan for an equitable future, we need to understand the history and experiences of the people who live, work, and play in each of Santa Fe's neighborhoods. Effective coordination between technical team members and inclusive communication strategies, and frequent input and review from WSP's embedded equity experts will coordinate timing of inputs, balancing of opinions and development of equitable policies that will inform our planning team's work. This collaborative work will advise project staff on community priorities and identify areas of improvement such as inclusive playgrounds, disadvantaged business opportunities, or affordable housing.

Specific efforts that WSP will include to integrate equity include:

- Advising on Community Partners to engage from equity communities, ensuring inclusion of populations of people of color (e.g., Asian, Black, Hispanic, Spanish, and Native/Indigenous communities)
- Provide content for community input (equity goals, equity analysis map, equity community asset map, etc.)
- Coordinate with the public engagement team on deliberate outreach to develop the Equity Community Needs Assessment.



## ENGAGEMENT TOOLS

During preparation of the Public Engagement Plan, WSP will work with the City to identify communications and engagement strategies and tools that clearly communicate the project goals, relay technical information, and provide opportunities to meaningfully influence the process, analysis, and recommendations. WSP will work with the City to determine the specific outreach activities that are needed at each project milestone in coordination with the technical work. At a minimum, we recommend the following:

- WSP will establish a multi-disciplinary, interactive platform through Social Pinpoint that will act as the public engagement hub for the project. This Social Pinpoint Hub will include opportunities for community members to provide input, stay up to date on the project, and team members to communicate project information in a graphically articulate way.
- Preparation of Community Conversation Kits that Community Partners can use to facilitate discussions, use at community events, or distribute while traveling around town or riding transit. These Kits may include project factsheets, key questions and answers, and instructions on how to facilitate the collection of valuable feedback at places people already frequent.
- Understanding that not everyone can attend a public meeting or receive a letter in the mail, we will work with our Community Partners to account for the needs of various interested parties and apply area appropriate methods to obtain community input on aspects of the planning process.
- Visioning workshops and open houses, an interactive idea board through the Social Pinpoint Hub, and project team tables at existing City and community events to inform the overall community vision and vision statements for each comprehensive plan element.

- Surveys and polls to gather feedback about specific topics as identified by the project team and City staff.

## PROJECT MATERIALS & BRAND IDENTITY

WSP will create a project brand and messaging that will be used throughout the project to provide a consistent graphic identity on all publicly distributed materials including the Social Pinpoint Hub, Community Conversation Kits, notices of events and meetings, and other materials that will promote the project, inform the community, and build consensus. All outreach materials will meet City of Santa Fe standards and will be developed in accordance with the City's Public Engagement Guide. All outreach materials will also be ADA-accessible, use better-practices for design and graphical communication, and be made available in both English and Spanish. Other language needs may be identified through the Public Engagement Plan process.



| Table 3: Public Engagement   | General Community   | Equity-focused Communities (EFC)   | Organized Stakeholders  | Partners                       | Decision-makers  |
|--|---|--|-------------------------|--------------------------------|--|
| <b>STEP 1</b><br>Mobilization and Understanding                                | • Open house on Assessment guiding themes and findings    | • City staff engagement<br>• EFC led conversations<br>• Stipend community partners support | • City staff engagement | • Technical Advisory Committee | • Introduction to the team and work program<br>• Stage gate readiness review |
| <b>STEP 2</b><br>Vision and Goals  | • Open house on vision and goals                          | • City staff engagement<br>• EFC led conversations<br>• Stipend community partners support | • City staff engagement | • Technical Advisory Committee | • Stage gate readiness review  |
| <b>STEP 3</b><br>Scenario Planning   | • Open house on scenarios                                 | • City staff engagement<br>• EFC led conversations<br>• Stipend community partners support | • City staff engagement | • Technical Advisory Committee | • Stage gate readiness review  |
| <b>STEP 4</b><br>Development of Preferred Plan                                 | • Open house on draft General Plan                        | • City staff engagement<br>• EFC led conversations<br>• Stipend community partners support | • City staff engagement | • Technical Advisory Committee | • Stage gate readiness review  |
| <b>STEP 5</b><br>Work Program and Funding Plan                                 | • Open house on work program and funding plan             | • City staff engagement<br>• EFC led conversations<br>• Stipend community partners support | • City staff engagement | • Technical Advisory Committee | • Stage gate readiness review  |
| <b>STEP → FORWARD</b><br>Governing Body Action + Implementation and Evaluation | • Regular communication<br>• Online civic engagement tool | • City staff engagement<br>• EFC led conversations<br>• Stipend community partners support | • City staff engagement | • Technical Advisory Committee | • Stage gate readiness review  |

### LISTENING, LEARNING, & REPORTING BACK

The feedback received throughout the public engagement process will be tracked by the project team in an Accountability Matrix, which will be used over the course of the project to record decisions and actions taken to address feedback, if any. The community feedback will be used in the reporting and analysis of key project documents as identified throughout the project lifecycle. All engagement activities will also be tracked and at the end of the project, an engagement summary, with insights and lessons learned, will be finalized. The Accountability Matrix will be included in the engagement summary to ensure transparency and accountability of the project team, and to help inform the City's future engagement efforts. Engagement findings will be incorporated into Task 5 efforts to ensure thorough and comprehensive communication of the community's vision and short- and long-term needs.

#### Deliverables:

- Kickoff meeting materials
- Project management plan
- Project SharePoint site

- Digital User Platform Strategic Roadmap: Launch Phase
- Social Pinpoint Hub or other online civic engagement tool
- Project communications brand, identity, supporting materials, and templates
- Public Engagement Plan, inclusive of CHART and Midtown outreach considerations
- Open house plans and materials, Community Conversation Kits, and other supporting public engagement materials in English and Spanish, per Table 3
- Governance model
- Administrative draft, public review draft and final assessment report completed in two phases
  - **Phase 1** will document the analysis of existing conditions and trends. The draft report will be published on the project website for public comments and recommendations
  - **Phase 2** will incorporate the public engagement findings and the City's short-term and long-term needs and desires



## STEP 2: VISION AND GOALS

### COMPLETE STREETS OR COMPLETE CORRIDORS?

Which is right for Santa Fe? Is the answer guided by context or feasibility? What can be accomplished in the short, medium, and long term? **These questions make citywide planning fun, exciting, and meaningful.**

With the benefit of a common baseline of understanding, the work begins to develop a vision for Santa Fe and goals to attain in realizing the vision. A vision is a high-level narrative and graphic communication of a future desired state. It should be brief, akin to a brochure. Goals are aspirational statements that guide the development of policies and implementation actions. The vision and goals will also be used to compare and evaluate the scenarios in Step 3. Conciseness is important to ensure that the General Plan is digestible and implementable. General Plans that represent lengthy wish lists are unwieldy to administer and sit on the shelf.

WSP will reference the General Plan Update Initiation Governing Body Resolution, the Assessment Report from Step 1 and the internal project team charrette to identify initial guiding themes to prepare an administrative draft vision and goals. Conceptual placetype groups will also be prepared to support creating an early, structured framework to support developing the vision and goals. A public review draft of the vision and goals will then be deployed pursuant to the Public Engagement Plan. Input from public engagement will then be used to refine and finalize the vision and goals. Planning Commission and Governing Body review will conclude this step as the stage gate prior to beginning Step 3, Scenario Planning.

#### Deliverables:

- Public communications and engagement materials per Table 3
- Internal project team charrette to develop vision and goals
- Administrative draft, public review draft and

final vision statement

- Administrative draft, public review draft and final goals
- Placetype initial groups cross referenced to LDC
- Digital User Platform Strategic Roadmap: Phase 2

## STEP 3: SCENARIO PLANNING

### SANTA FE SCENARIOS

*Different Potential Futures for Everyone Today and Tomorrow That Pull Forward an Indigenous Past*

- 1: Corridors of Mobility:** key corridors that could receive new housing and economic diversification to also support complete corridors, increasing ridership and competitiveness for funding robust transit
- 2. Centers of Opportunity:** with Midtown as an initial guide, identifying additional centers throughout the City and exploring refinements to the historic downtown area
- 3: Restoration for Resiliency:** emphasizing existing and degraded or lost natural systems to guide a resiliency framework, deepening the City's connection to nature for a sustainable and resilient future

Could these be the scenarios? Will the preferred plan be one scenario or a mix of all three? The process of technical study and engagement will ultimately guide the appropriate scenarios to create, develop, study, engage and select a preferred future.

Understanding different potential futures and the tradeoffs between those means that each scenario would emphasize different themes while maintaining fidelity to the vision and goals. Each concept is assessed against the project principles to provide a basis for evaluation and comparison.

CHART was and remains a highly important moment in the City's long history. The General Plan Update will be informed by outcomes of CHART. The University of New Mexico Indigenous Design and Planning Institute is a potential academic resource to tap for this project. While the Spanish Laws of



the Indies is well known for influencing the design of Santa Fe, what is less known is the influence of local indigenous populations on Santa Fe before the Spanish period. Understanding and incorporating indigenous cultural influence on urban design represents a tremendous opportunity to uncover repressed history and further Santa Fe as *the City Different*.

For the internal project team charrette, WSP will identify six thematic scenarios described in brief narrative form to facilitate discussion. As a standalone document, WSP will develop the initial higher order groups of placetypes. The WSP team will then develop three conceptual, thematic scenarios with placetypes applied to illustrate graphically and narratively a description of each scenario. WSP will also quantitatively and qualitatively characterize the scenarios again (vision, goals, and assessment report) along with public input. Modeling is possible as a separate, optional task, which can be developed, should the process suggest a particular modeling exercise be needed.

As transportation and land-use planning become more and more complex, the need for better planning tools grows. Communities, stakeholders and decision-makers are demanding robust analysis these days. System dynamics helps teams organize complex trends and better understand their interrelationships. We see many transportation agencies immediately jump to travel demand modelling (TDM) for the right answers, and unfortunately it rarely works out. TDM is great for understanding car, truck and transit travel patterns based on a fixed set of assumptions, but the quality of those assumptions is key; so, there must first be greater understanding and consensus around the assumptions that become input for the models.

The WSP Scenario Planning Toolbox enables decision-makers to test how different assumptions can impact cities and places around the world. The interactive system dynamics analysis tool, which can be adapted to local and regional conditions, allows multidisciplinary teams to collaborate on the interrelationships of trends for improved understanding, consensus-building and decision-making in the development scenarios.

**Deliverables:**

- Public communications and engagement materials per Table 3
- Scenario planning internal project team charrette
- Placetype categories within each group identified in Step 2 coordinated with LDC
- Six discussion draft scenario ideas for internal project team charrette
- Three thematic, conceptual level scenarios with one-page briefer for each with characterization and comparative analysis: administrative review, public draft review and final
- Digital User Platform Strategic Roadmap: Phase 3



**SMART CITY VALUE-ADD**

**The Smart City Team will aid the overall WSP team in development of Growth Scenarios for future land use and development patterns.**

Primarily, the WSP Smart City team's effort will be in development of telecommunications connectivity plans and technology integration strategies which accommodate each growth scenario. Benefits of such smart city connectivity strategies and technologies are, for example, easier district management despite the complexity inherent to growth.

The Smart City team will first assess what cutting-edge technologies and telecommunications infrastructure will be necessary to support each scenario. In terms of connectivity technologies, the team will explore shared connectivity means to ensure a reliable and high-speed data transmission infrastructure with clear return on investment or linked to enabling outcomes. This may involve recommending the upgrade of existing connectivity infrastructure to support the increased data loads expected. The team may provide a recommendation for 5G supporting infrastructure as well to enable faster data transfer rates, support emerging technologies, enable mobility, and include IoT.



**These forward-looking approaches will ensure that the City's connectivity plans are not only robust for the present but also prepared for the demands of future technology advancements and development growth.**

The team will include relevant insights from the Assessment Report on the City's current connectivity infrastructure and capabilities. The assessment will include an in-depth analysis of existing network systems, data communication protocols, and the overall capacity to support the anticipated growth. Our team will assess the readiness of the City for smart city applications, particularly the integration of connected sensors which support reporting and KPI tracking of growth scenarios. Example applications include the deployment of advanced sensors for environmental air quality monitoring, traffic management, waste management, footfall traffic, parking enforcement and other essential urban services. **The aim is to create a robust and interconnected technology landscape that can efficiently collect and transmit data to enhance City services and improve overall quality of life within each growth scenario.**

We recognize that Santa Fe is a prominent tourist attraction with visitors both during summer months hiking and exploring arts as well as during winter ski months. The opportunity data collection and connectivity brings is greater access to information for out-of-town visitors (parking availability, road conditions, public amenity availability) as well as operational insights to the City driving improved experiences (addressing faulty traffic signals, clearing snow from the road).

**STEP 4: DEVELOPMENT OF PREFERRED PLAN**

**SIMPLICITY FOR POWERFUL PRACTICALITY**

A focused plan that is readily digestible by many audiences, from the Governing Body to the Planning Commission, to neighborhood leaders and developers, to City staff, will be successful at realizing its vision and achieving its goals.

The General Plan document will intentionally be concise to facilitate ease of understanding and regular reference. The background information that went into informing its development will be placed in separate appendices. The General Plan must be a useful, usable document, not an encyclopedic homework assignment, which is how these important documents are all-too-often prepared.

An initial outline will be developed with the internal project team charrette as the basis for drafting the document; the topics listed in the RFP will be included, although the ordering and language may vary due to the updated process outcomes. Placetypes will also be fully developed, with specific types under each group, which were previously prepared during scenario planning. The placetypes will be closely coordinated with the LDC; it is expected there will be iteration between each. The framework for the natural, built, social, cultural and economic structure of the City to preserve, enhance and grow Santa Fe in a resilient, sustainable and equitable manner will be developed in narrative, map and graphic form in this step.

**Deliverables:**

- Administrative draft, public review draft and final General Plan document with appendices
- Public communications and engagement materials per Table 3
- General Plan document outlining internal project team charrette
- Complete draft of placetypes categories within each group, coordinated with LDC
- Digital User Platform Strategic Roadmap: Phase 4



**SMART CITY VALUE-ADD**

For the General Plan document, the Smart City team will outline the requirements necessary to transition the current development plan to a smart city model.

From a citizen experience perspective, the team will evaluate how the integration of smart technologies



can enhance daily life to address aspects such as improved public services, increased engagement, safety, and access to information in real-time. Depending on the desires of the City, the team will identify and specify the necessary technology components & systems—e.g., connected sensors, data networks, and IoT Devices—to support the enhanced citizen experience.

The smart city team will strategically apply findings from the Assessment Report to address the identified areas of development in City operations as well. We will identify key insights and pinpoint areas of improvement to define how the City can enhance its information sharing landscape between departments and to its citizens. The team will develop a roadmap in support of these improvements, outlining a step-by-step plan for the phased adoption of related technology solutions.

In essence, the team provides guidance through the General Plan for realizing citizen-centric and operational efficiency through smart technologies by defining the required infrastructure, technology specifications, and commitments necessary to transform the urban model of development.

## STEP 5: WORK PROGRAM AND FUNDING PLAN

### IF EVERYTHING IS A PRIORITY, THEN NOTHING IS

Being strategic demands setting priorities. The work program must be prioritized so it can be resourced with reasonably foreseeable staff availability, funding, and time. This also enables a programmatic approach to pursuing the generational federal funds available today to support accelerating implementation of the General Plan.

WSP will prepare a prioritized work program and identify potential local, regional, state, and federal funding sources to promote its implementation. The work program will also incorporate an administrative governance policy framework for City staff to use in its daily operations to ensure the General Plan is considered in daily municipal operations and

decision-making, being mindful that New Mexico law provides that the General Plan is an advisory plan.

Prioritization is crucial, as the organizational capacity to undertake the work to implement the General Plan is significant. General Plans that have endless pages of action items get ignored. Simplicity, focus, and prioritization are key.

WSP will produce Equitable Project Development and Delivery Guidelines to empower the City to pull the thread of equity into the fruit the General Plan bears. These project-agnostic guidelines can establish a consistent city-wide approach to project equity, regardless of what departments or champions may lead a project effort. We will also produce a Funding Program Equity Criteria Index, scanning the most relevant federal funding programs and compiling their equity criteria, so if the City is interested in sourcing federal funding directly, projects definitions and approach can be proactively aligned for competitive applications.

#### Deliverables:

- Internal project team charrette to outline the General Plan document
- Public communications and engagement materials per Table 3
- Administrative governance policy and procedure
- Administrative draft, public review draft and final implementation work program
- Equitable project development and delivery guidelines
- Digital User Platform Strategic Roadmap: Phase 5

## STEP → FORWARD: GOVERNING BODY ACTION + IMPLEMENTATION AND EVALUATION

### THE FINISH LINE AND THE STARTING LINE TOGETHER

All the process, technical work, and engagement, guided by readiness reviews to pass through each stage gate to the next step have led the project to



final hearings for action. Bold yet achievable plans can make it to this milestone with general consensus. But there will still be important fairly debatable decisions for the Governing Body to ultimately make. Once the finish line is crossed, there is no waiting at the starting line to implement the plan and continuously evaluate how it is working--a living document because it was prepared to be used to daily.



WSP will support City staff in preparing for final hearings before the Planning Commission, Governing Body and any other established City advisory body with preparatory meetings and a PowerPoint presentation. WSP will attend the one final hearing each before the Planning Commission and Governing Body. WSP will advise City staff on monitoring and evaluating progress in implementing the updated General Plan after the General Plan Update is adopted to support City staff in building organizational capacity, including supporting staff in standing up a long-range planning division and integrating with the CIP.

**Deliverables:**

- Public communications and engagement materials per Table 3
- Internal charrette to prepare for final action on General Plan and preparatory implementation steps
- One decision-maker briefing PowerPoint presentation for City staff to use in briefing decision-makers
- One Planning Commission hearing and presentation
- One Governing Body hearing and presentation
- Digital User Platform Strategic Roadmap: Phase 6

**STEP ONGOING: ADMINISTRATIVE COORDINATION + ENGAGEMENT AND COMMUNICATION**

Using the project management plan tools developed in Step 1, biweekly team meetings will be held. Additionally, quarterly meetings will be held with the LDC Update team to facilitate information sharing and coordination. Engagement and communication based on the public engagement plan will occur throughout the life of the project.

**Deliverables:**

- Biweekly team agenda and notes
- Quarterly LDC update team agenda and notes
- Monthly e-newsletter
- Periodic social media posts
- PowerPoint presentations for periodic Planning Commission and Governing body updates conducted by City staff, including Step stage gates
- Monthly progress reports and invoices

## 4. DESIRABLE SPECIFICATION

### OUR PROVEN TRACK RECORD

WSP and its teaming partners, Leland Consulting Group and Design Workshop, have a proven track record of preparing General Plans and similar plans. **Please refer to the Organizational Experience section projects and resumes.** Our team's experience goes beyond, as we understand how to support projects from conception to delivery, demonstrating that our experience will make this General Plan implementable and usable daily.

### OUR KNOWLEDGE & PHILOSOPHIES RELATE TO CITY OF SANTA FE'S GOALS

WSP and its teaming partners have substantial experience working for municipal clients across the country. Therefore, we understand how municipal governments are structured, administered and engaged by the public, allowing us to effectively manage a complex project like the General Plan. WSP's project manager served three quarters of his career in the public sector across six states, including leading municipal planning departments responsible for General Plans.

### OUR ABILITY TO WORK COLLABORATIVELY

WSP is already working successfully with the City of Santa Fe, from its support for infrastructure projects to serving as the owner's representative for the Public Works Department on the Midtown project. WSP recently supported City staff before the Governing Body on the Midtown project. WSP and its team members regularly collaborate with other firms. WSP's project manager has a relationship with principals in both firms extending back over 25 years.

### OUR UNDERSTANDING OF THE CITY OF SANTA FE'S UNIQUE HISTORY & EXPERIENCE WITH SPANISH SPEAKING & MINORITY COMMUNITIES

**Please refer to the Understanding and Approach of the Response to Specifications section of the proposal.** Additionally, the deputy project manager and public engagement lead has working knowledge of Spanish. We regularly engage with Spanish speaking and minority communities. Our approach to engagement includes Spanish language materials, identifying equity focused communities, anticipation of a stipend for community partners so they may effectively participate and a desire to engage with the University of New Mexico Indigenous Design and Planning Institute.

### OUR ALTERNATIVE WORK PLAN THAT SUPPORT CITY OF SANTA FE'S VISION, GOALS, & OBJECTIVES

WSP has proposed an alternate work plan based on our experience in conducting General Plan Updates and similar planning documents. The result allows for better integration with the LDC Update, a faster completion from a stepwise, consensus-building approach. Additionally, WSP has proposed a value-add focus on Smart Cities, to support the City of Santa Fe in modernizing and diversifying its economic base. We have also proposed to support local and regional governance for better decision-making and collaboration across these scales.



## 5. LOCAL PREFERENCE

### STATE OF NEW MEXICO

TAXATION AND REVENUE DEPARTMENT

### RESIDENT BUSINESS CERTIFICATE

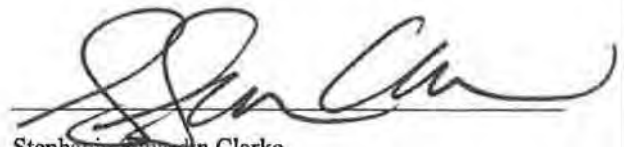
Issued to: WSP USA INC.

DBA: WSP USA INC.  
1 PENN PLZ 6TH FLOOR  
NEW YORK, NY 10119-0002

Expires: **01-Sep-2025**

Certificate Number:

**L1318621296**



Stephanie Schardin Clarke  
*Cabinet Secretary*

THIS CERTIFICATE IS NOT TRANSFERABLE





**City of Santa Fe**  
Treasury Department  
200 Lincoln Ave.  
Santa Fe, New Mexico 87504-0909  
505-955-6551

**BUSINESS REGISTRATION**

**Business Name:** WSP USA INC.  
DBA: WSP USA INC.

**Business Location:** 150 WASHINGTON AVE  
SANTA FE, NM 87501

**Owner:** WSP USA INC

**License Number:** 230545

**Issued Date:** August 03, 2023

**Expiration Date:** August 03, 2024

**CRS Number:** 01195458002

**License Type:** Business License - Renewable

**Classification:** Business Registration - Standard

**Fees Paid:** \$35.00

WSP USA INC.  
2019 W GALISTEO ST UNIT M-1  
SANTA FE, NM 87505

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OTHER BUSINESSES OR PREMISES.

TO BE POSTED IN A CONSPICUOUS PLACE

Ver 11. 1/19/2023



## H. OTHER SUPPORTING MATERIAL

Please see the following pages for our signed Non-Collusion Affidavit and Conflict of Interest forms.



**NON-COLLUSION AFFIDAVIT**  
*Complete, Sign and Return with your proposal.*

I hereby affirm that: I am the Senior Vice President (insert title) and the duly authorized representative of WSP USA Inc. (insert organization's name) whose address is 2440 Louisiana Blvd NE, Suite 400, Albuquerque, NM 87110. 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 Manjeet Ranu

Title Senior Vice President

Date 11/28/2023



## **CONFLICT OF INTEREST STATEMENT FOR CONSULTING FIRMS**

*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 Principal Planning Consultant 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 Planning Consultant and known key personnel needs to describe the conflict.

The Planning Consultant agrees that, if after award, an organizational conflict of interest is discovered, the Planning Consultant makes an immediate and full written disclosure to the City that includes a description of the action that the Planning Consultant 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 Planning Consultant 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, Manjeet Ranu 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 General Plan Update. For the duration of this firm's involvement in the General Plan Update contract, this firm agrees not to accept any gift, benefit, 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 General Plan Update contract.

I certify that this firm will keep all General Plan Update 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 General Plan Update contract. I understand that if this firm leaves this General Plan Update 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 General Plan Update 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 General Plan Update 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:

WSP USA Inc.

Authorized Representative/Title:

Senior Vice President

Phone Number:

505-881-5357

Fax Number:

N/A

Email Address:

Manjeet.Ranu@wsp.com

Signature:



Date:

11/28/2023

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.





WSP USA is the U.S. operating company of WSP, one of the world's leading engineering and professional services firms. Dedicated to serving local communities, we are engineers, planners, technical experts, strategic advisors, and construction management professionals. WSP USA designs lasting solutions in the buildings, transportation, energy, water, and environment markets. With more than 15,500 employees in over 300 offices across the U.S., we partner with our clients to help communities prosper.

WSP USA Inc  
2440 Louisiana Blvd NE  
Suite 400  
Albuquerque, NM 87110

505-881-5357  
[www.wsp.com](http://www.wsp.com)

## Contract Exhibit 3

CITY OF SANTA FE  
PLANNING & LAND USE DEPARTMENT

# GENERAL PLAN UPDATE

*COST PROPOSAL*

RFP #24/20/P

Revised April 22, 2024

EXHIBIT B





*The City Different*



**EXHIBIT B**  
City of Santa General Plan Update

Cost Proposal

## APPENDIX C COST RESPONSE FORM

### Aligned to Alternative Scope of Work

| Description  | Estimated Hours | Cost      |
|--|-----------------|-----------|
| Step 1: Mobilization and Understanding                                   | 2,260           | \$440,000 |
| Step 2: Vision and Goals   | 1,520           | \$280,000 |
| Step 3: Scenario Planning  | 1,140           | \$285,000 |
| Step 4: Development of Preferred Plan                                    | 1,180           | \$295,000 |
| Step 5: Work Program and Funding   | 840             | \$185,000 |
| Step Forward: Governing Body Action + Implementation and Evaluation      | 260             | \$65,000  |
| Step Ongoing: Administrative Coordination + Engagement and Communication | 780             | \$195,000 |

All amounts provided must include all labor, materials, equipment, transportation, configuration, installation, training and profit to provide the goods and/or services described in Section IV.A. (as amended by any current RFP amendments for the period specified).

#### Forecast Cost Per Fiscal Year

|        |           |
|--------|-----------|
| FY2024 | \$50,000  |
| FY2025 | \$740,000 |
| FY2026 | \$658,000 |
| FY2027 | \$289,000 |

The logo for WSP, consisting of the lowercase letters 'wsp' in a stylized, lowercase, sans-serif font.

EXHIBIT B

The logo for WSP, consisting of the lowercase letters 'wsp' in a stylized, lowercase, sans-serif font.

WSP USA is the U.S. operating company of WSP, one of the world's leading engineering and professional services firms. Dedicated to serving local communities, we are engineers, planners, technical experts, strategic advisors, and construction management professionals. WSP USA designs lasting solutions in the buildings, transportation, energy, water, and environment markets. With more than 15,500 employees in over 300 offices across the U.S., we partner with our clients to help communities prosper.



# CITY OF SANTA FE PROCUREMENT CHECKLIST



**Contractor Name:** WSP USA, Inc.

**Procurement/contract Title:** General Plan Update

**Procurement Method/Vehicle:**  Sole Source  State Price Agreement/Existing  Cooperative  Request For Proposals(RFP)  Invitation To Bid (ITB)  Exempt: 13-1-98

Small Purchase (Contract Under \$60,000)  Other: \_\_\_\_\_

**Requesting Department:** Community Development      **Staff Name:** Heather Lamboy

**Procurement Requirements:**

Procurement files shall be maintained for all purchases and contracts, regardless of the method of procurement. The procurement files shall contain the basis on which the awards are made, all submitted bids/proposals, all evaluation materials (bid tabs or Evaluation Committee Reports), scoresheets, quotations, and all other documentation related to or prepared in conjunction with evaluations, negotiations, and the award processes. The procurements shall contain written determinations from the Requesting Departments, signed by the Chief Procurement Officers (this document), setting forth the reasoning for the contract award decisions before submitting them to the Committees.

**REQUIRED DOCUMENTS FOR APPROVAL BY PURCHASING (CPD)**

| YES                                 | N/A                      |  | YES                                 | N/A                      |   |
|-------------------------------------|--------------------------|--|-------------------------------------|--------------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Written Determination (srvs)   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Quote(s) (3 Valid & Current for Over 20k) |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | RFP - Confidential info to be provided to GB by CPD Buyer  | <input type="checkbox"/>            | <input type="checkbox"/> | BAR                                       |
| <input type="checkbox"/>            | <input type="checkbox"/> | ITB (include bid tab)  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | FIR                                       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Other: _____   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Certificate of Insurance (srvs)           |
| <input type="checkbox"/>            | <input type="checkbox"/> | Cooperative Agreements and GSAs and Statewide Price Agreements (include the cover page to show valid date, and items to be purchased)        |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Horizon Declination or Screenshot of <a href="http://horizonsofnewmexico.org/services.html">horizonsofnewmexico.org/services.html</a> (srvs) |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Summary of Contract (only on contracts)  |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Current Santa Fe Business Registration (or Exemption if no tax)  |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Executed Contract or Price Agreement (legal and contractor must sign before purchasing approves)   |                                     |                          |   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Chief Procurement Officer (or designee) Approval for Exempt from Procurement (use memo on our site)  |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Evaluation Committee Report (RFPs only)  |                                     |                          |   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Signed Sole Source Determination, Vendor Written Quote, SS Letter from Contractors, and 30 Days Email  |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | >20k = Memo addressed to City Manager (Under 150K) Committees/City Council (Over 150K)   |                                     |                          |   |

|                             |  |                  |
|-----------------------------|--|------------------|
| <u>Heather Lamboy</u>       | <u>Assistant Director, Planning &amp; Land Use</u> | <u>5-16-2024</u> |
| Department Point of Contact | Title  | Date             |
| _____                       | _____  | _____            |
| Department Director         |  | Date             |
| _____                       |  | _____            |
| Chief Procurement Officer   |  | Date             |
| _____                       |  | _____            |
| ITT Representative          | Title  | Date             |
| _____                       | _____  | _____            |



# City of Santa Fe

## Summary of Contract, Agreement, Amendment & Lease

All applicable fields to be completed by department (complete 1.b only if you are processing an amendment):

1.a Munis Contract: 3204702 Procurement # (RFP/ITB# If any): 24/20/P

Contractor: WSP USA, Inc.

Procurement Method/Vehicle: Small Purchase  RFP  ITB  Sole Source  GSA  Cooperative  Exempt  SWPA/Existing

Description/Title: General Plan Update and Digital User Platform

Contract:  Agreement:  Lease/Rent:  Amendment:

Term Start Date: When Signed Term End Date: 6/30/2028 Total Contract Amount: \$1,887,871.87

Approved by Council (If over the City Manager's approval threshold, you must go through GB)

Contract / Lease: Contract (Initial Approval)

1.b Amendment #: N/A to the Original Contract/Lease # \_\_\_\_\_

Increase/(Decrease) Amount \$: N/A

Extend Expiration Date to: N/A

Approved by Council (If the original went through GB, all amendments must go through GB regardless of the amendment reason) Date: \_\_\_\_\_

Amendment is for: N/A

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

This is an initial contract approval request for the update of the General Plan and creation of a digi

### 3. Procurement History:

[Signature] Purchasing Officer Review: \_\_\_\_\_ Date: May 21, 2024

Comment & Exceptions: 13-1-112. Competitive sealed proposals; request for proposals.

### 4. Funding Source: General Fund Org / Object: 1004501/510300

Andy Hopkins Budget Officer Approval: \_\_\_\_\_ Date: May 21, 2024

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

### 5. Grant History (if applicable): N/A

Grants Administrator Approval: \_\_\_\_\_ Date: \_\_\_\_\_

Staff Contact who Completed This Form: Heather Lamboy Phone #: 505-470-5281

To be recorded by City Clerk: \_\_\_\_\_ Email: hllamboy@santafenm.gov

Clerk # \_\_\_\_\_  
Date of Execution: \_\_\_\_\_

ITT Representative (attesting that all information is reviewed) \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

WSP USA INC.  
1 PENN PLZ 6TH FLOOR  
NEW YORK, NY 10119-0002

June 29, 2023  
NM Business Tax ID:  
01-195458-00-2  
Letter ID: L0758727280

**STATE OF NEW MEXICO TAXATION AND REVENUE DEPARTMENT**  
**REGISTRATION CERTIFICATE**

|  |   |   |
|--|---|---|
| Date ID Issued<br><b>06-Dec-1983</b>               | IDENTIFICATION NUMBER<br><b>0119545800Z-GRT</b> | Business Start Date<br><b>06-Dec-1983</b> |
| Business Location<br><b>2440 LOUISIANA BLVD NE</b> | Business End Date                               |   |
| City and State<br><b>ALBUQUERQUE, NM</b>           | Zip Code<br><b>87110-4383</b>                   |   |
| Taxpayer Name<br><b>WSP USA INC.</b>               | Taxpayer Type<br><b>Corporation</b>             |   |
| Firm Name<br><b>WSP USA INC.</b>                   | Filing Frequency<br><b>Monthly</b>              |   |
| Mailing Address<br><b>4139 OREGON PIKE</b>         |   |   |
| City and State<br><b>EPHRATA, PA</b>               | Zip Code<br><b>17522-9550</b>                   |   |

This Registration Certificate is issued pursuant to Section 7-1-12 NMSA 1978 for Gross Receipts, County Gross Receipts, and Municipal Gross Receipts Taxes. This copy must be displayed conspicuously in the place of business. Any purchaser of the registrants business is subject to certain requirements under Section 7-1-61 NMSA 1978.

Cabinet Secretary

By 

Any inquiries concerning your Identification Number should be addressed to the Audit & Compliance Division, P.O. Box 630, Santa Fe, New Mexico 87504-0630

Form Revised 02/2003

**THIS CERTIFICATE IS NOT TRANSFERABLE**

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**City of Santa Fe**  
Treasury Department  
200 Lincoln Ave.  
Santa Fe, New Mexico 87504-0909  
505-955-6551

## BUSINESS REGISTRATION

**Business Name:** WSP USA INC.  
DBA: WSP USA INC.

**Business Location:** 150 WASHINGTON AVE  
SANTA FE, NM 87501

**Owner:** WSP USA INC

**License Number:** 230545

**Issued Date:** August 03, 2023

**Expiration Date:** August 03, 2024

**CRS Number:** 01195458002

**License Type:** Business License - Renewable

**Classification:** Business Registration - Standard

**Fees Paid:** \$35.00

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Form Revised 02/2003

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**TO BE POSTED IN A CONSPICUOUS PLACE**





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

5/10/2024

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

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

|   |   |                                    |
|---|---|------------------------------------|
| <b>PRODUCER</b><br>Arthur J. Gallagher Risk Management Services, LLC<br>300 Madison Avenue, 28th Floor<br>New York NY 10017 | <b>CONTACT NAME:</b> AJG Sevice Team<br><b>PHONE (A/C, No, Ext):</b> 212-994-7020<br><b>E-MAIL ADDRESS:</b> GGB.WSPUS.CertRequest@ajg.com | <b>FAX (A/C, No):</b> 212-994-7074 |
|   | <b>INSURER(S) AFFORDING COVERAGE</b>  |                                    |
| <b>INSURED</b><br>WSP USA Inc.<br>One Penn Plaza<br>New York, NY 10119  | <b>INSURER A:</b> QBE Specialty Insurance Company   | <b>NAIC #</b><br>11515             |
|   | <b>INSURER B:</b>   |                                    |
|   | <b>INSURER C:</b>   |                                    |
|   | <b>INSURER D:</b>   |                                    |
|   | <b>INSURER E:</b>   |                                    |
|   | <b>INSURER F:</b>   |                                    |

**COVERAGES**                      **CERTIFICATE NUMBER:** 1520264365                      **REVISION NUMBER:**

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

| INSR LTR | TYPE OF INSURANCE  | ADDL SUBR INSD WVD   | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS   |
|----------|--|--|---------------|-------------------------|-------------------------|--|
|          | <b>COMMERCIAL GENERAL LIABILITY</b><br><input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR<br><br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC<br>OTHER: |  |               |                         |                         | EACH OCCURRENCE \$<br>DAMAGE TO RENTED PREMISES (Ea occurrence) \$<br>MED EXP (Any one person) \$<br>PERSONAL & ADV INJURY \$<br>GENERAL AGGREGATE \$<br>PRODUCTS - COMP/OP AGG \$<br>\$ |
|          | <b>AUTOMOBILE LIABILITY</b><br><input type="checkbox"/> ANY AUTO<br><input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY<br><input type="checkbox"/> HIRED AUTOS ONLY   |  |               |                         |                         | COMBINED SINGLE LIMIT (Ea accident) \$<br>BODILY INJURY (Per person) \$<br>BODILY INJURY (Per accident) \$<br>PROPERTY DAMAGE (Per accident) \$<br>\$                                    |
|          | <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR<br><b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE<br>DED    RETENTION \$  |  |               |                         |                         | EACH OCCURRENCE \$<br>AGGREGATE \$<br>\$   |
|          | <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below  | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> N/A |               |                         |                         | PER STATUTE    OTH-ER<br>E.L. EACH ACCIDENT \$<br>E.L. DISEASE - EA EMPLOYEE \$<br>E.L. DISEASE - POLICY LIMIT \$  |
| A        | Professional Liability<br>CLAIMS-MADE  |  | QPL0022630    | 11/1/2023               | 10/31/2024              | Per Claim \$2,000,000<br>Aggregate \$2,000,000   |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 THIRTY (30) DAYS NOTICE OF CANCELLATION  
 Opportunity #US-WSP-202304667 | Project Description: General Plan Update for the City of Santa Fe, New Mexico.

**CERTIFICATE HOLDER****CANCELLATION**

City of Santa Fe  
 200 Lincoln Ave.  
 Santa Fe NM 87501

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

AUTHORIZED REPRESENTATIVE

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# 3-Procurement\_Checklist\_V3\_12.1\_.23\_GPU 5-20-24

Final Audit Report

2024-05-21

|                 |  |
|-----------------|--|
| Created:        | 2024-05-21                                 |
| By:             | JIMMY TAPIA (jptapia@santafenm.gov)        |
| Status:         | Signed                                     |
| Transaction ID: | CBJCHBCAABAADe1AqnRPJ2vX8VjxpcydrptVco68p2 |

## "3-Procurement\_Checklist\_V3\_12.1\_.23\_GPU 5-20-24" History

-  Document created by JIMMY TAPIA (jptapia@santafenm.gov)  
2024-05-21 - 5:35:39 PM GMT- IP address: 63.232.20.2
-  Document emailed to ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov) for signature  
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✔ Agreement completed.

2024-05-21 - 10:14:57 PM GMT



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**Acrobat Sign**



**CITY OF SANTA FE  
PLANNING & LAND USE**

---

DATE: May 16, 2024

TO: Mayor Webber and City Council  
Finance and Quality of Life Committees

VIA: Emily Oster, Finance Department Director  
Travis Dutton-Leyda, Chief Procurement Officer  
Rich Brown, Community Development Department Director &  
Jason Kluck, Planning & Land Use Department Director /''''

FROM: Heather L. Lamboy, AICP, Assistant Director, Planning & Land Use Department tf-U..

SUBJECT: General Plan Update Contract

VENDOR: WSP USA, Inc.

---

**ITEM AND ISSUE**

Request for Approval of a Professional Services Agreement with WSP USA, Inc, to Update the General Plan and Create a Digital User Platform In the Total Amount of \$1,887,871.87, Inclusive of NMGRT for a Four Year Term.

**BACKGROUND AND SUMMARY**

The General Plan is adopted by resolution and is the comprehensive planning document that sets the City of Santa Fe's (City's) official policies guiding the long-ranging planning of physical growth, community development, and public services, as well as the City's goals for subjects including equity, inclusion, sustainability, affordability, and mobility. The General Plan is composed of several chapters, each focusing on specific topics related to the planning and development of the city. The goals and objectives of each chapter are used to set City policy and are implemented through the City's Code of Ordinances, regulating documents such as the Future Land Use Map, comprehensive planning efforts, and other mechanisms.

The last comprehensive update of the currently adopted General Plan was in 1999, after several years of community engagement, research, and drafting. Since 1999, the city has seen significant population growth, infrastructure and sustainability concerns and economic fluctuations, and thus much of the data supporting the 1999 plan is now out of date. Additionally, realignment with the City's Capital Improvement Plan is needed. Finally, it should be acknowledged that 20-25 years is generally considered to be the lifespan of a city-wide plan such as Santa Fe's General Plan.

This contract proposes that the process for the General Plan Update be informed by a robust community conversation addressing the issues raised by the Governing Body, the associated recommendations in



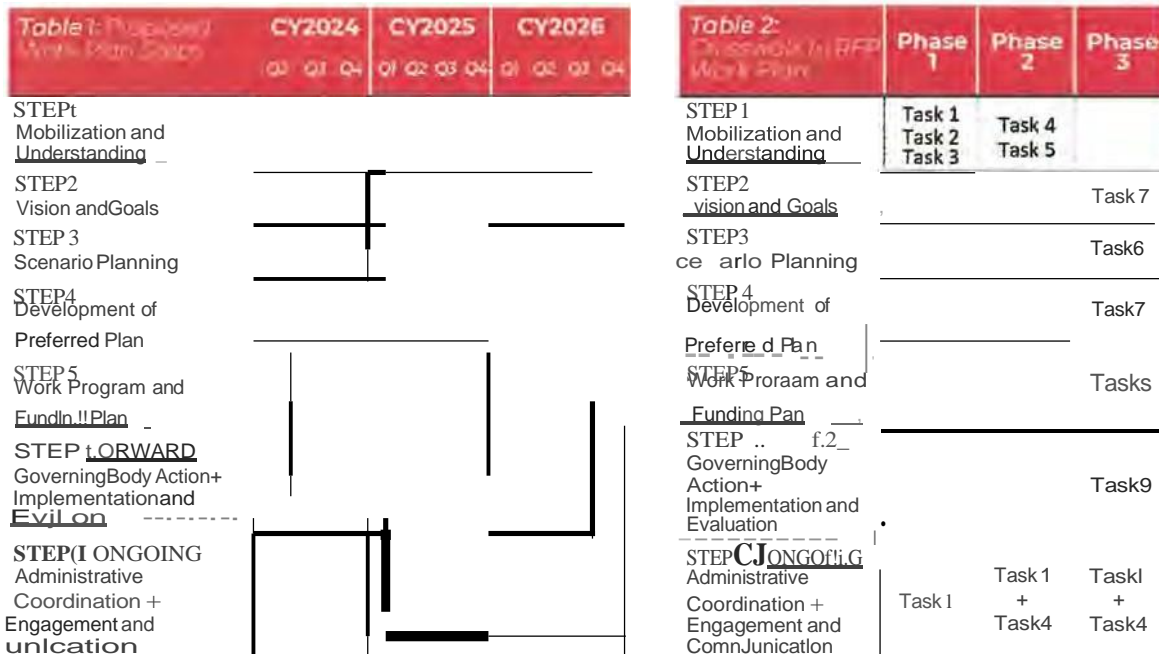
# CITY OF SANTA FE PLANNING & LAND USE

the Governing Body resolution that was approved on March 24, 2023, and other recommendations and subject matter for consideration as identified, such as growth planning and management, mobility and accessibility, adaptability, resiliency and sustainability, inclusion and equity, and economic strength and opportunity. Furthermore, the contract calls for staff and the consultant to undertake efforts to evaluate the 1999 plan to identify its strengths and deficiencies. This will help ensure that proposed policies are informed by the successes and beneficial outcomes, as well as the shortcomings, of the current plan and will best address the needs of the Santa Fe community.

Included in the scope of work is the development of a digital platform that will not only provide information on the General Plan Update process, but also the Zoning Code update process, community engagement associated with both projects, and a robust Geographic Information Systems (GIS) platform where community members can access information on subdivision plats, development plans, special use approvals, historic preservation inventory forms, building permits, and much more. The development of this platform will provide more accessible information which could assist in reducing the overall number of public information (IPRA) requests.

The consultant offered an accelerated Work Plan that will shorten the duration of the update project. The intent of this accelerated pace is to ensure that the General Plan aligns with Phase 3 of the Land Development Code update, where the consultants of the two projects will review the draft General Plan and Land Development Code updates to ensure consistency between the two documents.

### Crosswalk illustrating Alternative Proposed Work Plan as compared to the RFP Scope of Work:



Given these considerations, the Planning and Land Use Department seeks to contract approval for consulting services for an update of the City's General Plan. This RFP will include a detailed project



## CITY OF SANTA FE PLANNING & LAND USE

description and scope of work for the General Plan update. The consultant(s) will be selected based on their proposals, experience and estimated budget.

New Mexico Statutes 1978, Chapter 3, Article 19, Planning and Platting and Article 21, Zoning Regulations, outline the City's responsibility to adopt a "master plan", also referred to as a "comprehensive plan". For consistency's sake, this memo and the resolution for the RFP refer to the City's "General Plan," instead of a "master plan" or "comprehensive plan," as the document under consideration.

### CONTRACT NUMBER

The FY2024 Munis contract number is 3250006

### PROCUREMENT METHOD

The Department completed an RFP procurement for these professional services, the contract expires June 30, 2028.

### FUNDING SOURCE

The funding source is:

Fund Name/Number: General Fund 100

Munis Org Name/Number: Land Use 1004501

Munis Object Name/Number: Professional Contracts 510300

Total: \$1,887,871.87

### CAPITAL ASSET

Yes  No

### CAPITAL PROJECT

Yes  No

### ACTION REQUESTED

The Community Development Department respectfully requests your review and approval of the General Plan Update contract.

### ATTACHMENTS:

1. Signed Contract
2. Memo to **Quality** of Life Committee, Finance Committee, and Governing Body
3. Procurement Checklist
4. Summary of Contract
5. Certificate of Liability
6. WSP Business Registration

Signature: 

Email: jmkluck@santafenm.gov

Signature: 

Email: rdbrown@santafenm.gov

# CITY OF SANTA FE PROCUREMENT CHECKLIST



Contractor Name: WSP USA, Inc.

Procurement/contract Title: General Rel. P. Un. & Data

**Procurement Method Vehicle:**  Sole Source  State Price Agreement/Existing  D

Cooperative  IZIRequest For Proposals(RFP)  Invitation To Bid (1TB)  Exempt; 13-1-98

Small Purchase (Contract Under \$60,000)  Other: \_\_\_\_\_

Requesting Department: Community Development

StaffName: HeatherLambo

**Procurement Requirements:**

Procurement files shall be maintained for all purchases and contracts, regardless of the method of procurement. The procurement files shall contain the basis on which the awards are made, all submitted bids/proposals, all evaluation materials (bid tabs or Evaluation Committee Reports), scoresheets, quotations, and all other documentation related to or prepared in conjunction with evaluations, negotiations, and the award processes. The procurements shall contain written determinations from the Requesting Departments, signed by the Chief Procurement Officers (this document), setting forth the reasoning for the contract award decisions before submitting them to the Committees.

**REQUIRED DOCUMENTS FOR APPROVAL BY PURCHASING (CPD)**

| YES                                 | N/A                      |   | YES                                 | N/A                      |   |
|-------------------------------------|--------------------------|---|-------------------------------------|--------------------------|---|
| <input type="checkbox"/>            | <input type="checkbox"/> | Written Determination (srvs)  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Quote(s) (3 Valid & Current for Over 20k) |
| <input type="checkbox"/>            | <input type="checkbox"/> | RFP - Confidential info to be provided to GB by CPD Buyer   | <input type="checkbox"/>            | <input type="checkbox"/> | BAR                                       |
| <input type="checkbox"/>            | <input type="checkbox"/> | 1TB (include bid tab)   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | FIR                                       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Other: _____  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Certificate of Insurance (srvs)           |
| <input type="checkbox"/>            | <input type="checkbox"/> | Cooperative Agreements and GSAs and Statewide Price Agreements (include the cover page to show valid dal page, and items to be purchased) |                                     |                          |   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Horizon Declination or Screenshot of horizonsofnewmexico.org/services.html(srvs)  |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Summary of Contract (only on contracts)   |                                     |                          |   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Current Santa Fe Business Registration (orExemption if notax)   |                                     |                          |   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Executed Contract or Price Agreement (legal and contractor must sign before purchasing approves)  |                                     |                          |   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Chief Procurement Officer (or designee) Approval for Exempt from Procurement (use memo on our site)                                       |                                     |                          |   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Evaluation Committee Report (RFPs only)   |                                     |                          |   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Signed Sole Source Determination, Vendor Written Quote, SS Letter from Contractors, and 30 Days Email                                     |                                     |                          |   |
| <input type="checkbox"/>            | <input type="checkbox"/> | >10k::: Memo addressed to City Manager (Under 150.K) Committees/City Council (Over 150.K)   |                                     |                          |   |

|                             |  |                    |
|-----------------------------|--|--------------------|
| Department Point of Contact | <u>Assistant Director. Planning &amp; Land Use</u> | <u>5-16-2024</u>   |
| Department Director         |  | <u>05/20/2024</u>  |
| Chief Procurement Officer   |  | <u>May21, 2024</u> |
| ITT Representative          |  | <u>Date</u>        |



# City of Santa Fe

## Summary of Contract, Agreement, Amendment & Lease

All applicable fields to be completed by department (complete 1.b only if you are processing an amendment):

1.a Munis Contract: 3250006 Procurement# (RFP/ITB# If any): 24/20/P

Contractor: WSP USA, Inc.

Procurement Method/Vehicle:  Small Purchase  **RFP/ITB**  Sole Source  GSA  **D** Cooperative  Exempt  SWPA/Existin O

Description/mtle: General Plan Update and Digital User Platform

Contract: Agreement: @ Lease/Rent: [\$] Amendment: [Q]

Term Start Date: When Signed Term End Date: 6/30/2028 Total Contract Amount: \$1,887,871.87

Approved by Council (If over the City Manager's approval threshold, you must go through GB)

Contract / Lease: Contract (Initial Approval)

1.b Amendment #: N / A to the Original Contract/Lease# \_\_\_\_\_

Increase/(Decrease) Amount\$: N / A

Extend Expiration Date to: N / A

Approved by Council (If the original went through GB, all amendments must go through GB regardless of the amendment reason) ae.

Amendment is for: N/A

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

This is an initial contract approval request for the update of the General Plan and creation of a digital user platform.

### 3. Procurement History:

Purchasing Officer Review: \_\_\_\_\_ Date: May 21, 2024

Comment & Exceptions: 13-1-112. Competitive sealed proposals; request for proposals.

4. funding Source: General Fund Org / Object: 1004501/510300

11/1/2024 Budget Officer Approval: \_\_\_\_\_ Date: May 21, 2024

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

### 5. Grant History (if applicable): N/A

Grants Administrator Approval: \_\_\_\_\_ Date \_\_\_\_\_

Staff Contact who Completed This Form: Heather Lamboy Phone #: 505-470-5281

To be recorded by City Clerk: \_\_\_\_\_ Email: hllambo y @ santafenm gov

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

ITT Representative (attesting that all information is reviewed) \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

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 **WSP USA Inc**, 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 facilitate a comprehensive review and revision of the City of Santa Fe's General Plan. The Contractor shall provide the following services-for the City:

In response to RFP#24/20/P (Contract Exhibit 1), the Contractor proposes an alternative work plan and modified process intended to provide an accelerated project timeline. The alternate process provided in the Contractor's Technical Proposal (Contract Exhibit 2) and Cost Proposal (Contract Exhibit 3) shall encompass all requested elements and shall be inclusive of services and work product deliverables detailed in the scope of work set forth in RFP #24/20/P.

The Contractor shall provide the following services, further described in the Contractor's Technical Proposal (Contract Exhibit 2) attached hereto, to the City as represented in their proposal to the City in response to RFP #24/20/P.

STEP 1 - Mobilization and Understanding  
Approximately 9 months

Scope of work and deliverables:

- 1, Kickoff meeting and materials
2. Project management plan
3. Project SharePoint site

4. Digital User Platform development: Launch Phase
5. Social Pinpoint Hub or other equivalent online civic engagement tool
6. Project communications brand, identity, supporting materials, and templates
7. Public Engagement Plan, inclusive of CHART and Midtown outreach considerations
8. Open house plans and materials, Community Conversation Kits, and other supporting public engagement materials in English and Spanish
9. Governance model
10. Administrative draft, public review draft and final assessment report completed in two phases. **Phase 1** will document the analysis of existing conditions and trends. The draft report will be published on the project website for public comments and recommendations. **Phase 2** will incorporate the public engagement findings and the City's short-term and long-term needs and desires

**STEP 2- Vision and Goals**  
Approximately 6 months

Scope of works and deliverables:

1. Public communications and engagement materials
2. Internal project team charrette to develop vision and goals
3. Administrative draft, public review draft and final vision statement
4. Administrative draft, public review draft and final goals
5. Place-type initial groups cross referenced to City's Land Development Code (LDC)
6. Digital User Platform development: Phase 2

**STEP 3 - Scenario Planning**  
Approximately 6 months

Scope of work and deliverables:

1. Public communications and engagement materials
2. Scenario planning internal project team charrette
3. Place-type categories within each group identified in Step 2 coordinated with LDC
4. Six discussion draft scenario ideas for internal project team charrette
5. Three thematic, conceptual level scenarios with one-page brief for each with characterization and comparative analysis: administrative review, public draft review and final
6. Digital User Platform development: Phase 3

**STEP 4 - Development of Preferred Plan**  
Approximately 6 months

Scope of work and deliverables:

1. Administrative draft, public review draft and final General Plan document with appendices
2. Public communications and engagement materials
3. General Plan document outlining internal project team charrette

4. Complete draft of place-types categories within each group, coordinated with LDC
5. Digital User Platform development: Phase 4

**STEP 5- Work Program and Funding Plan**  
Approximately 3 Months

Scope of work and deliverables:

1. Internal project team charrette to outline the General Plan document
2. Public communications and engagement materials
3. Administrative governance policy and procedure
4. Administrative draft, public review draft and final implementation work program
5. Equitable project development and delivery guidelines
6. Digital User Platform development: Phase 5

**STEP FORWARD - Governing Body Action & Implementation and Evaluation**  
Approximately 3 Months

Scope of work and deliverables:

1. Public communications and engagement materials
2. Internal charrette to prepare for final action on General Plan and preparatory implementation steps
3. One decision-maker briefing PowerPoint presentation for City staff to use in briefing decision-makers
4. One Planning Commission hearing and presentation
5. One Governing Body hearing and presentation
6. Digital User Platform development: Phase 6

**STEP ONGOING - Administrative Coordination+ Engagement and Communication**

Scope of work and deliverables:

1. Biweekly team agenda and notes
2. Quarterly LDC update team agenda and notes
3. Monthly e-newsletter
4. Periodic social media posts
5. PowerPoint presentations for periodic Planning Commission and Governing body updates conducted by City staff, including Step stage gates
6. Monthly progress reports and invoices

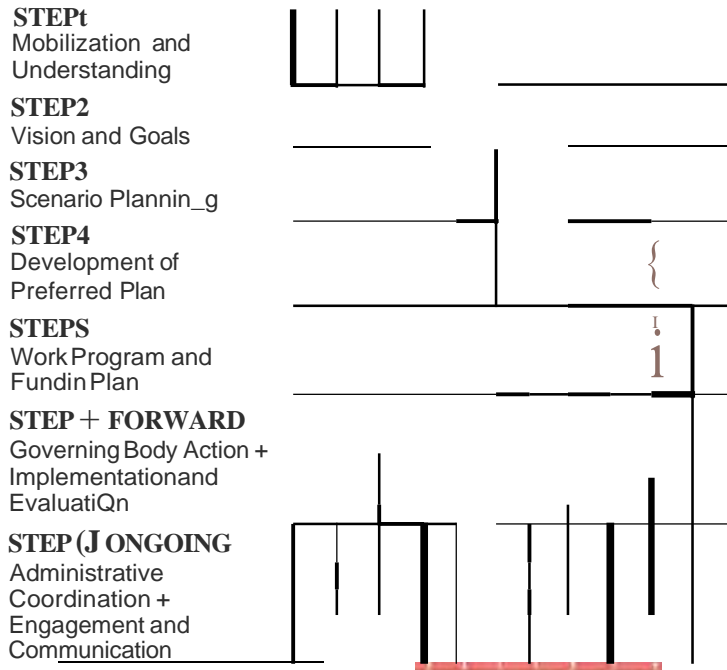
Crosswalk illustrating Alternative Proposed Work Plan as compared to the RFP Scope of Work:

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CY2024, 'CY2025 - CY20i6,

Ol |)' |P| |A| OJ |U1|P| |q| |) |U |t; |

Table 2: Crosswalk to RFP Work Plan



|   | Phase 1                    | Phase 2          | Phase 3         |
|---|----------------------------|------------------|-----------------|
| <b>STEP1</b><br>Mobilization and Understanding  | Task 1<br>Task 2<br>Task 3 | Task 4<br>Task 5 |                 |
| <b>STEP2</b><br>Vision and Goals  |                            |                  | Task 7          |
| <b>STEP3</b><br>Scenario Plannin_g  |                            |                  | Task 6          |
| <b>STEP4</b><br>Development of Preferred Plan   |                            |                  | Task 7          |
| <b>STEP5</b><br>Work Program and Fundin Plan  |                            |                  | Task 8          |
| <b>STEP + FORWARD</b><br>Governing Body Action+ Implementation and EvaluatiQn         |                            |                  | Task 8          |
| <b>STEP C., ONGOING</b><br>Administrative Coordination + Engagement and Communication | Task 1                     | Task 1 + Task 4  | Task 1 + Task 4 |

**2. Standard of Performance: Licenses**

A. The Contractor does hereby accept its designation as a professional service, rendering services related to the General Plan Update 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 deliverables detailed above, such compensation not to exceed ONE MILLION, SEVEN HUNDRED FORTY-FIVE THOUSAND DOLLARS (\$1,745,000), excluding gross receipts tax. The New Mexico gross receipts tax levied on the amounts payable under this Contract totaling ONE HUNDRED FORTY-TWO THOUSAND, EIGHT ffjNDRED SEVENTY-ONE DOLLARS and EIGHTY-SEVEN CENTS (\$142,871.87) shall be paid by the City to the Contractor. The total amount payable to the Contractor under this Contract, including gross receipts tax and expenses, shall not exceed ONE MILLION, EIGHT HUNDRED EIGHTY-SEVEN THOUSAND, EIGHT HUNDRED SEVENTY-ONE DOLLARS and EIGHTY-SEVEN CENTS (\$1,887,871.87). This amount is a maximum and not a guarantee that the work assigned to be performed by Contractor under this

Contract 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 Contract 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 Contract being amended in writing prior to those services in excess of the total compensation amount being provided.

Contractor's Cost Proposal (Contract Exhibit 3) outlines annual funding required to adhere to the project schedule (Proposed Work Plan Steps) presented in the Technical Proposal (Contract Exhibit 2).

B. Payment is subject to availability of funds pursuant to the Appropriations Paragraph set forth below and to any negotiations between the parties from year to year pursuant to Paragraph 1, Scope of Work, and to approval by the City. All invoices MUST BE received by the City no later than thirty (30) days after the termination of the Fiscal Year in which the services were delivered. Invoices received after such date WILL NOT BE PAID.

C. Payment in future fiscal years is subject to availability of funds pursuant to the Appropriations Paragraph set forth below and to any negotiations between the parties from year to year pursuant to Paragraph 1, Scope of Work, and to approval by the City. All invoices MUST BE received by the City no later than fifteen (15) days after the termination of the Fiscal Year in which the services were delivered. Invoices received after such date WILL NOT BE PAID.)

D. Contractor must submit a detailed statement accounting for all services performed and expenses incurred. If the City finds that the services are not acceptable, within thirty days after the date of receipt of written notice from the Contractor that payment is requested, it shall provide the Contractor a letter of exception explaining the defect or objection to the services, and outlining steps the Contractor may take to provide remedial action. Upon certification by the City that the services have been received and accepted, payment shall be tendered to the Contractor within thirty days after the date of acceptance. If payment is made by mail, the payment shall be deemed tendered on the date it is postmarked.

E. If the City fails to pay the contractor within twenty-one days after receipt of an undisputed request for payment, the City shall pay interest to the contractor beginning on the twenty-second day after payment was due, computed at one and one-half percent of the undisputed amount per month or fraction of a month until the payment is issued. If the City receives an improperly completed invoice, the City shall notify the sender of the invoice within seven days of receipt in what way the invoice is improperly completed, and the owner has no further duty to pay on the improperly completed invoice until it is resubmitted as complete.

**F. 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. ~~!£!:!!!~~

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), or 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 payment 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 #24/20/P 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 as broad as ISO Form CG 00 01 with limits not less than \$2,000,000 per occurrence and \$2,000,000 in the aggregate for claims against bodily injury, personal and advertising injury, and property damage. Said policy shall include broad form 1. 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, proceedings, 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 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: Heather Lamboy, Procurement Manager., City of Santa Fe  
200 Lincoln Ave, Box 909  
Santa Fe, NM 87504-0909  
[hlJambo@a.santaferun.nm.gov](mailto:hlJambo@a.santaferun.nm.gov)

To the Contractor: WSP USA Inc.  
Daniel Sims, Senior Vice President  
2440 Louisiana Blvd NE, Suite 400  
Albuquerque, NM 87110  
[dan.sims@wsp.com](mailto:dan.sims@wsp.com)

**29. Authorih\***

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

CITY OF SANTA FE:

Alan Webber (May 31, 2024 15:46 MDT)  
ALAN WEBBER, MAYOR

CONTRACTOR:

WSP, USA Inc  
Matthew Sibul  
MATT SIBUL

DATE: May 17, 2024

TITLE: SENIOR VICE PRESIDENT

CRS#: 01-195458-002

Registration#: 230545

ATTEST:

GERALYN CARDENAS, INTERIM CITY CLERK  
XIV

CITY ATTORNEY'S OFFICE:

Rebecca MnuK-Herrmann May 17, 2024  
REBECCA :MNUK-HERRMANN, ASSISTANT CITY ATTORNEY

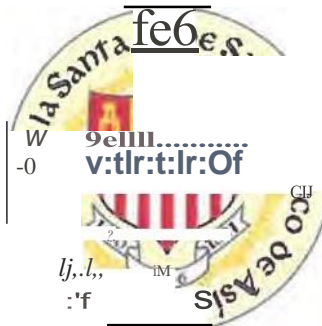
APPROVED FOR FINANCES:

Emily K. Oster  
FINANCE DIRECTOR, EMILY OSTER

City of Santa Fe  
Planning and Land Use Department

REQUEST FOR PROPOSALS (RFP)

General Plan Update



RFP#  
24/20/P

RFP Release Date: October 18, 2023

Proposals Due Date: November 28, 2023

**ELECTRONIC-ONLY PROPOSAL SUBMISSION**

# Contents

|   |           |
|---|-----------|
| <b>I. INTRODUCTION</b> .....                                | <b>S</b>  |
| A. PURPOSE OF THIS REQUEST FOR PROPOSALS .....              | 5         |
| B. BACKGROUND INFORMATION .....                             | 5         |
| C. SCOPE OF PROCUREMENT .....                               | 7         |
| D. PROCUREMENT MANAGER .....                                | 7         |
| E. PROPOSAL SUBMISSION .....                                | 8         |
| F. DEFINITION OF TERMINOLOGY .....                          | 8         |
| G. PROCUREMENT LIBRARY .....                                | 11        |
| <b>11. CONDITIONS GOVERNING THE PROCUREMENT</b> .....       | <b>13</b> |
| A. SEQUENCE OF EVENTS .....                                 | 13        |
| B. EXPLANATION OF EVENTS .....                              | 13        |
| 1. Issue RFP .....  | 13        |
| 2. Acknowledgement of Receipt Form .....                    | 14        |
| 3. Pre-Proposal Conference .....                            | 14        |
| 4. Deadline to Submit Written Questions .....               | 14        |
| 5. Response to Written Questions .....                      | 15        |
| 6. Submission of Proposal .....                             | 15        |
| 7. Proposal Evaluation .....                                | 15        |
| 8. Selection of Finalists .....                             | 15        |
| 9. Oral Presentations .....                                 | 16        |
| 10. Finalize Contractual Agreements .....                   | 16        |
| 11. Contract Awards .....                                   | 16        |
| 12. Protest Deadline .....                                  | 16        |
| C. GENERAL REQUIREMENTS .....                               | 17        |
| 1. Acceptance of Conditions Governing the Procurement ..... | 17        |
| 2. Incurring Cost .....                                     | 17        |
| 3. Prime Contractor Responsibility .....                    | 17        |
| 4. Subcontractors/Consent .....                             | 17        |
| 5. Amended Proposals .....                                  | 17        |
| 6. Offeror's Rights to Withdraw Proposal .....              | 17        |
| 7. Proposal Offer Firm .....                                | 18        |
| 8. Disclosure of Proposal Contents .....                    | 18        |
| 9. No Obligation .....                                      | 18        |
| 10. Termination .....                                       | 18        |
| 11. Sufficient Appropriation .....                          | 18        |
| 12. Legal Review .....                                      | 19        |
| 13. Governing Law .....                                     | 19        |
| 14. Basis for Proposal .....                                | 19        |
| 15. Contract Terms and Conditions .....                     | 19        |
| 16. Offerors Terms and Conditions .....                     | 20        |
| 17. Contract Deviations .....                               | 20        |
| 18. Offeror Qualifications .....                            | 20        |
| 19. Right to Waive Minor Irregularities .....               | 20        |
| 20. Change in Contractor Representatives .....              | 20        |
| 21. Notice of Penalties .....                               | 20        |
| 22. Department Rights .....                                 | 20        |
| 23. Right to Publish .....                                  | 21        |
| 24. Ownership of Proposals .....                            | 21        |
| 25. Confidentiality .....                                   | 21        |

|  |  |           |
|--|--|-----------|
| 26.  | <i>Electronic mail address required</i> .....                        | 21        |
| 27.  | <i>Use of Electronic Versions of this RFP</i> .....                  | 21        |
| 28.  | <i>Campaign Contribution Disclosure Form</i> .....                   | 21        |
| 29.  | <i>Letter of Transmittal</i> .....                                   | 21        |
| 30.  | <i>Disclosure Regarding Responsibility</i> .....                     | 22        |
| 31.  | <i>Local Preferences</i> .....                                       | 24        |
| 32.  | <i>Living Wage</i> .....   | 25        |
| <b>III. RESPONSE FORMAT AND ORGANIZATION</b> ..... |  | <b>25</b> |
| A.   | NUMBER OF RESPONSES .....  | 25        |
| B.   | NUMBER OF COPIES .....   | 25        |
| 1.   | <i>ELECTRONIC SUBMISSION ONLY Responses</i> .....                    | 25        |
| C.   | PROPOSAL FORMAT .....  | 26        |
| 1.   | <i>Proposal Content and Organization</i> .....                       | 26        |
| <b>IV. SPECIFICATIONS</b> .....                    |  | <b>28</b> |
| A.   | GOALS .....  | 28        |
| B.   | OBJECTIVES .....   | 29        |
| C.   | ASSUMPTIONS .....  | 29        |
| D.   | DETAILED SCOPE OF WORK .....   | 30        |
| B.   | TECHNICAL SPECIFICATIONS .....                                       | 35        |
| 1.   | <i>Organizational Experience</i> .....                               | 35        |
| 2.   | <i>Mandatory Specification</i> .....                                 | 35        |
| 3.   | <i>Desirable Specification</i> .....                                 | 36        |
| C.   | BUSINESS SPECIFICATIONS .....  | 36        |
| 1.   | <i>Letter of Transmittal Form</i> .....                              | 36        |
| 2.   | <i>Campaign Contribution Disclosure Form</i> .....                   | 36        |
| 3.   | <i>Oral Presentation</i> .....                                       | 37        |
| 4.   | <i>Cost</i> .....  | 37        |
| 5.   | <i>Local Preference</i> .....  | 37        |
| <b>V. EVALUATION</b> .....                         |  | <b>38</b> |
| A.   | EVALUATION POINT SUMMARY .....                                       | 38        |
| B.   | EVALUATION FACTORS .....   | 38        |
| 1.   | <i>B.1 Organizational Experience (See Table 1)</i> .....             | 38        |
| 3.   | <i>8.3 Desirable Specifications</i> .....                            | 38        |
| 4.   | <i>C.1 Letter of Transmittal (See Table 1)</i> .....                 | 39        |
| 5.   | <i>C.2 Campaign Contribution Disclosure Form (See Table 1)</i> ..... | 39        |
| 6.   | <i>C.3 Oral Presentation (See Table 1)</i> .....                     | 39        |
| 7.   | <i>C.4 Cost (See Table 1)</i> .....                                  | 39        |
| 8.   | <i>C.5. Local Preferences</i> .....                                  | 39        |
| C.   | EVALUATION PROCESS .....   | 40        |
| <b>APPENDIX A</b> .....                            |  | <b>41</b> |
|  | ACKNOWLEDGEMENT OF RECEIPT FORM .....                                | 41        |
| <b>APPENDIX B</b> .....                            |  | <b>43</b> |
|  | CAMPAIGN CONTRIBUTION DISCLOSURE FORM .....                          | 43        |
| <b>APPENDIX C</b> .....                            |  | <b>47</b> |
|  | COST RESPONSE FORM .....   | 47        |
| <b>APPENDIX D</b> .....                            |  | <b>49</b> |
|  | LETTER OF TRANSMITTAL FORM .....                                     | 49        |
| <b>APPENDIX E</b> .....                            |  | <b>S1</b> |

|                               |           |
|-------------------------------|-----------|
| NON-COLLUSION AFFIDAVIT ..... | 51        |
| <b>APPENDIX F .....</b>       | <b>53</b> |
| CONFLICT OF INTEREST .....    | 53        |
| <b>APPENDIX G .....</b>       | <b>56</b> |
| DRAFT CONTRACT .....          | 56        |

# I. INTRODUCTION

## A. PURPOSE OF TIDS REQUEST FOR PROPOSALS

The purpose of the Request for Proposals (RFP) is to solicit sealed proposals to establish a contract through competitive negotiations for a Land Use Planning Consultant to facilitate a comprehensive review and revision of the City of Santa Fe's (City) General Plan. New Mexico Statute refers to this plan as a "Master Plan" and other government entities refer to it as "comprehensive" plan or "master" plan.

## B. BACKGROUND INFORMATION

The City of Santa Fe enjoys a long history as a municipality and in prior eras spanning from settlement by the first Indigenous populations (whose descendants still call it Oga Po'geh, White Shell Water Place), and followed by the Spanish Influence beginning in the 1500's and American influence from the 1900's to modern times. Modern planning efforts began in Santa Fe in 1946, with the adoption of the "City Plan" prepared by Harland Bartholomew and Associates.

First adopted in 1972, and subsequently updated in 1983 and 1999, The General Plan is the City of Santa Fe's policy guide for land development, planning and growth objectives, related implementation strategies, and the administration of the Land Development Code. It serves as the statement of goals, recommendations and policy guidance for the development of the physical environment of Santa Fe and other geographic areas in Santa Fe's region. The General Plan will serve as a basis for land development approvals and other land and planning related implementation programs within the City. The goals, vision, implementation policies and work programs, and policy guidance of the General Plan may be amended from time to time to meet the changing requirements of the City.

The General Plan guides the comprehensive, long-range plan for the development and responsible stewardship of Santa Fe's resources. It is a critical tool for priority identification and decision making. It provides a policy framework for development proposals, capital improvements, annexation, and extension of public services. It represents the vision of the Santa Fe community and should be recognized as the City's foremost commitment to Santa Fe's future growth and redevelopment objectives. It outlines a vision through various themes that reflect the aspirations of the community and establishes a basis for review of development proposals and public projects to ensure that they are consistent with policy objectives. It provides for strategies that will enhance the character of the community and preserve critical environmental and historic resources and minimize potential hazards. It provides the basis for establishing and setting priorities for implementing programs and regulations and provides the basis for nurturing a vital community and assuring input from all segments of the population.

The General Plan's last comprehensive update was adopted in 1999, after several years of community engagement, analysis and drafting. The 1999 General Plan, along with the Future Land Use Map, continues to be the presiding document which guides city planning and land use policy and review of new development proposals. While many of the themes in the 1999 General Plan remain relevant for

contemporary planning, the data and analysis in 1999 General Plan have not been updated to reflect contemporary circumstances in Santa Fe and the shifting priorities of the world at large, it is no longer directly tied to the City's Capital Improvements Plans and does not incorporate plans adopted since 1999.

Due to these circumstances, the City is endeavoring to revise the General Plan to reflect current conditions and respond to contemporary issues such as climate change, housing affordability, and social equity. The General Plan Update should acknowledge and honor relevant components of the existing 1999 General Plan while recognizing contemporary challenges and opportunities. The revision should identify economic, demographic and environmental changes in Santa Fe in the years since the 1999 General Plan was adopted. It should then identify both the short-term and long-term needs and desires of the community and provide a strategic framework for addressing those needs in a responsible and equitable way.

The General Plan Update will be conducted concurrently with the Land Development Code (LDC) Update project, Phase 1 of which is already underway. The LDC Update is a multi-phase project led by the Land Use and Planning Department in collaboration with Clarion Associates, a consulting firm that specializes in ordinance development and plan implementation, to restructure and update the City's Land Development Code.

Phase 1 of the project is focused on identifying issues with the code and recommending non-substantive amendments to the code's organization and text that will make the code easier to understand and administer. Phase 2 of the project is focused on more substantive changes including LDC's procedures, regulations, and zoning districts. Finally, Phase 3 of the project focuses on adding additional substantive revisions to implement the land use and growth goals and policies of the updated Santa Fe General Plan identified by General Plan Update project. The General Plan Update consultant is expected to collaborate with the Land Development Code update project team across all three phases, but particularly in Phase 3, where the code will be amended to reflect the goals and policies identified in the General Plan update project. The full Land Development Code project scope is provided in the Procurement Library (Section LG.).

In addition to the LDC update, the following planning activities are ongoing and will need to be included in the Plan update:

1. Culture, History, Art, Reconciliation and Truth (CHART): an extensive public engagement effort initiated in response to the period of civil unrest in 2020.
2. Santa Fe Water 2100: a 100-year water resource plan currently being drafted by the City's Water Division.
3. Midtown District Redevelopment: A major City-led redevelopment project of the former College of Santa Fe campus. A master plan has been completed and RFP's have been issued for development proposals.
4. Complete Streets Engineering Handbook: An effort led by the Public Works Department to update the City's Street design and engineering standards and move them from the Land Development Code to an Engineering Handbook managed by Public Works.
5. Bicycle and Multi-modal Master Plans Update: An effort led by the Santa Fe Metropolitan Planning Organization to update the existing Bicycle and Multimodal Master Plans.

The General Plan Update consultant is expected to collaborate with the project teams and incorporate the findings from these ongoing planning efforts into the goals and objectives identified as part of the update project.

### **C. SCOPE OF PROCUREMENT**

This RFP is to solicit the procurement of a qualified Land Use and Planning Consultant to facilitate a comprehensive review and revision of the City of Santa Fe's (City) General Plan. The Consultant Services may include, but are not limited to, administrative coordination and support, public engagement, land use planning analysis and recommendations delivered in a variety of formats including reports, maps, digital and paper publications. The Consultant Team may include subcontractors, community organizations and other relevant members needed to perform the required tasks.

Tasks and Phases are meant to provide guidance on structure and schedule of deliverables but may change due to circumstances including but not limited to Land Development Code Rewrite progression, Consultant recommendations or other circumstances.

The Tasks and Phases listed in Section IV. Scope of Work are intended to include the entire General Plan Update project, however only Phase 1 *is* currently funded. The subsequent Phases 2 and 3 will be undertaken as funding becomes available in subsequent fiscal years.

### **PROJECT TERM**

The project procurement will be for four (4) years.

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 Planning and Land Use Department 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: Heather Lamboy, Assistant Director of Planning and Land Use, Procurement  
Manager

Telephone: (505) 955-6598

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

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

Central Purchasing Office: [purchasine. RFP{ci..santafenm.2ov](#)

Offerors may contact **ONLY** the Procurement Manager and the Central Purchasing Office regarding this procurement. Other city employees or Evaluation Committee members do not have the authority to respond on behalf of the Procurement Manager.

2. **Protests of the solicitation or award must be submitted in writing to the Protest Manager identified in Section 11.B.12.** As a Protest Manager has been named in this Request for Proposals, pursuant to NMSA 1978, §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.** 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:*  
<http://11s:/d/11-ofsantafe.nnultareife.comlr-r61Zl99d2a98094545a0fc75efdb971/Yb>

## F. DEFINITION OF TERMINOLOGY

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

1. **"Authorized Purchaser"** means an individual authorized by a Participating Entity to place orders against this contract.
2. **"Award"** means the final execution of the contract document.
3. **"Business Hours"** means 8:00 AM thru 5:00 PM MST/MDT, whichever is in effect on the date given.
4. **"Central Purchasing Office"** means the office responsible for the control of procurement of items of tangible personal property, services, or construction.
5. **"Chief Procurement Officer"** means that person within the Central Purchasing Office who is responsible for the control of procurement of items of tangible personal property, services, or construction.
6. **"City"** means the City of Santa Fe, New Mexico which in the procurement context may act through the Finance Director, City Manager, or Governing Body.
7. **"Close of Business"** means 5:00 PM Mountain Standard or Daylight Time, whichever is in use at that time.
8. **"Confidential"** means confidential financial information concerning Offeror's organization and data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act

NMSA 1978, §§57-3-A-1 through 57-3A-7. The following items may **not** be labelled as confidential: Offeror's submitted Cost response, Staff/Personnel Resumes/Bios (excluding personal information such as personal telephone numbers and/or home addresses), and other submitted data that is!!!!confidential financial information or that qualifies under the Uniform Trade Secrets Act.

9. "**Contract**" means any agreement for the procurement of items of tangible personal property services, or construction.
10. "**Contractor**" means any business having a contract with the City of Santa Fe.
11. "**Department**" means the Requesting Department sponsoring this Procurement.
12. "**Determination**" means the written documentation of a decision of a procurement officer including findings of fact required to support a decision. A determination becomes part of the procurement file to which it pertains.
13. "**Desirable**" - the terms "may," "can," "should," "preferably," or "prefers" identify a desirable or discretionary item or factor.
14. "**Electronic Submission**" means a successful submittal of Offeror's proposal.
15. "**Electronic Version/Copy**" means a digital form consisting of text, images or both that are readable on computers or other electronic devices. The electronic version/copy can only be uploaded to ShareFile.
16. "**Evaluation Committee**" means a body appointed to perform the evaluation of Offerors' proposals.
17. "**Evaluation Committee Report**" means a report prepared by the Procurement Manager and the Evaluation Committee to support the Committee's recommendation for contract award. It will contain scores and written evaluations of all responsive Offeror proposals.
18. "**Final Award**" means, in the context of this Request for Proposals and all its attendant documents, that point at which the final required signature on the contract(s) resulting from the procurement has been affixed to the contract(s) thus making it fully executed.
19. "**Finalist**" means an Offeror who meets all the mandatory specifications of this Request for Proposals and whose score on evaluation factors is sufficiently high to merit further consideration by the Evaluation Committee.
20. "**General Plan**" means the adopted policy guide and program development for the City of Santa Fe, synonymous with a City "Comprehensive Plan" or "Master Plan."

21. "**Hourly Rate**" means the proposed fully loaded maximum hourly rates that include travel, per diem, fringe benefits and any overhead costs for contractor personne as well as subcontractor personnel if appropriate.
22. "**IT**" means Information Technology.
23. "**Living Wage**" means the City's minimum hourly wage necessary for a person to achieve a higher standard of living.
24. "**Land Development Code**" means the Santa Fe Code of Ordinances chapters that regulates all development activity within the City limits. Also known as "Chapter 14".
25. "**Mandatory**" - the terms "must," "shall" "will," "is required," or "are required," identify a mandatory item or factor. Failure to meet a mandatory item or factor may result in the rejection of the Offeror's proposal.
26. "**Minor Irregularities**" means anything in the proposal that does not affect the price, quality and/or quantity, or any other mandatory requirement.
27. "**Offeror**" is any person, corporation, or partnership who chooses to submit a proposal.
28. "**Procurement Manager**" means any person or designee authorized by the Requesting Department to facilitate the procurement and or administer the contract(s).
29. "**Project**" means a temporary process undertaken to solve a well-defined goal or objective with clearly defined start and end times, a set of clearly defined tasks, and a budget. The project terminates once the project scope is achieved, and project acceptance is given by the project executive sponsor.
30. "**Redacted**" means a version/copy of the Offeror's proposal with the information considered proprietary or confidential (as defined by NMSA 1978, §§ 57-3A-1 to 57-3A-7 and summarized herein and outlined in Section II.C.8 of this RFP) blacked-out BUT NOT omitted or removed.
31. "**Request for Proposals (RFP)**" means all documents, including those attached or incorporated by reference, used for soliciting proposals.
32. "**Requesting Department**" means the City Department responsible for overseeing the work or delivery of tangible personal property by a contractor.
33. "**Responsible Offeror**" means an Offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that his financial resources, production or service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services, or items of tangible personal property described in the proposal.

34. **"Responsive Offer"** or means an offer which conforms in all material respects to the requirements set forth in the request for proposals. Material respects of a request for proposals include, but are not limited to price, quality, quantity, or delivery requirements.
35. **"Sealed"** means, in terms of a non-electronic submission, that the proposal is enclosed in a package which is completely fastened in such a way that nothing can be added or removed. Open packages submitted will not be accepted except for packages that may have been damaged by the delivery service itself. The City of Santa Fe reserves the right, however, to accept or reject packages where there may have been damage done by the delivery service itself. Whether a package has been damaged by the delivery service or left unfastened and should or should not be accepted is a determination to be made by the City's Chief Procurement Officer. By submitting a proposal, the Offeror agrees to and concurs with this process **and** accepts the determination of the Chief Procurement Officer in such cases.
36. **"Staff"** means any individual who is a full-time, part-time, or an independently contracted employee with the Offerors' company.
37. **"State (the State)"** means the State of New Mexico.
38. **"Statement of Concurrence"** means an affirmative statement from the Offeror to the required specification agreeing to comply and concur with the stated requirement(s). This statement shall be included in Offerors proposal. (E.g., "We concur," "Understands and Complies," "Comply," "Will Comply if Applicable,")
39. **"Unredacted"** means a version/copy of the proposal containing all complete information; including any that the Offeror would otherwise consider confidential, such copy for use only for the purposes of evaluation.
40. **"Written"** means typewritten on standard 8 ½ x 11-inch paper. Larger paper is permissible for charts, spreadsheets, etc.

## **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://www.santafen.gov/bids\\_rfp](https://www.santafen.gov/bids_rfp)

Other relevant links:

[Resolution Adopted: Next Steps to Revise the City of Santa Fe's General Plan](#)

[City of Santa Fe General Plan \(1999\)](#)

[City of Santa Fe Long-Range Planning webpage](#)

[City of Santa Fe Land Development Code](#)

[City of Santa Fe Land Development Code Update Project Website](#)

[City of Santa Fe Land Development Code Update Contract and Scope](#)

[City of Santa Fe Complete Streets Resolution](#)

## 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 Office and the Procurement Manager will make every effort to adhere to the following schedule:

| <b>Action</b>                           | <b>Responsible Party</b>                 | <b>Due Dates</b>         |
|---|--|--------------------------|
| 1. Issue <b>RFP</b>                     | Central Purchasing Office                | October 18, 2023         |
| 2. Acknowledgement of Receipt Form      | Potential Offerors                       | November 1, 2023         |
| 3. Pre-Proposal Conference              | Requesting Department                    | November 1, 2023         |
| 4. Deadline to submit Written Questions | Potential Offerors                       | November 3, 2023         |
| 5. Response to Written Questions        | Procurement Manager                      | November 10, 2023        |
| <b>6. Submission of Proposal</b>        | <b>Potential Offerors</b>                | <b>November 28, 2023</b> |
| 7. Proposal Evaluation                  | Evaluation Committee                     | November 29, 2023        |
| 8. Selection of Finalists               | Evaluation Committee                     | December 12, 2023        |
| 10. Oral Presentation(s)                | Finalist Offerors                        | January 8, 2024          |
| 11. Finalize Contractual Agreements     | Requesting Department/Finalist Offerors  | January 16, 2024         |
| 12. Contract Awards                     | Requesting Department/ Finalist Offerors | February 29, 2024        |
| 13. * Protest Deadline                  | Central Purchasing Office                | +15 days                 |

Dates indicated in Events 7 through 13 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 shown in Section II.A., above.

#### 1. Issue RFP

This RFP is being issued on behalf of The City Planning and Land Use Department on the date indicated in Section II.A, Sequence of Events.

## 2. Acknowledgement of Receipt Form

Potential Offerors may email the Acknowledgement of Receipt Form (APPENDIX A), to the Central Purchasing Office at [Purchasing@RFP@santafenm.gov](mailto:Purchasing@RFP@santafenm.gov), to have their organization placed on the procurement Distribution List. The form must be returned to the Central Purchasing Office by 3:00 pm MST/ MDT on the date indicated in Section II.A, Sequence of Events

The procurement distribution list will be used for the distribution of written responses to questions, and/or any amendments to the RFP. Failure to return the Acknowledgement of Receipt Form does not prohibit potential Offerors from submitting a response to this RFP. However, by not returning the Acknowledgement of Receipt Form, the potential Offeror's representative shall not be included on the distribution list and will be solely responsible for obtaining from the Procurement Library (Section I.G.) responses to written questions and any amendments to the RFP.

## 3. Pre-Proposal Conference

A pre-proposal conference will be held as indicated in Section II.A. Sequence of Events, beginning at 1:30 P.M. MST/MDT via Microsoft Teams.

### Microsoft Teams meeting

**Join on your computer, mobile app or room device**

[Click here to join the meeting](#)

Meeting ID: 241 333 958 126

Passcode: coJLAE

[Download Teams](#) | [Join on the web](#)

[Learn More](#) | [Meeting options](#)

**Potential Offeror(s) are encouraged to submit written questions in advance of the conference to the Central Purchasing Office and the Procurement Manager** (see Section 1.D). The identity of the organization submitting the question(s) will not be revealed. Additional written questions may be submitted at the conference. All questions answered during the Pre-Proposal Conference will be considered **unofficial** until they are posted in writing. All written questions will be addressed in writing on the date listed in Section II.A, Sequence of Events. A public log will be kept of the names of potential Offeror(s) that attended the pre-proposal conference.

Attendance at the pre-proposal conference is highly recommended., but not a prerequisite for submission of a proposal.

## 4. Deadline to Submit Written Questions

Potential Offerors may submit written questions to the Central Purchasing Office and the Procurement Manager as to the intent or clarity of this RFP until 3:00 pm MST/MDT as indicated in Section II.A, Sequence of Events. All written questions must be addressed to the Central Purchasing Office and the Procurement Manager as declared in Section I.D.

Questions shall be clearly labeled and shall cite the Section(s) in the RFP or other document which form the basis of the question.

## 5. Response to Written Questions

Written responses to the written questions will be provided via email, on or before the date indicated in Section II.A, Sequence of Events, to all potential Offerors who timely submitted an Acknowledgement of Receipt Form (Section II.8.2 and APPENDIX A).

An electronic version of the Questions and Answers will be posted to:  
[https://www.santafenm.gov/bids\\_rfps](https://www.santafenm.gov/bids_rfps)

## 6. Submission of Proposal

At this time, only electronic proposals are allowed. Do not submit hard copies until further notice.

ALL OFFEROR PROPOSALS MUST BE RECEIVED FOR REVIEW AND EVALUATION BY THE CENTRAL PURCHASING OFFICE  
<https://cityofsantafenm.sharefile.com/r-r6a199d.2a98094545a0fc75efdb971f9b>  
NO LATER THAN **3:00 PM** MST/MDT ON THE DATE INDICATED IN SECTION II.A, SEQUENCE OF EVENTS. **PROPOSALS RECEIVED AFTER THIS DEADLINE WILL NOT BE ACCEPTED.** The date and time of receipt will be recorded on each proposal.

*Proposals must be submitted electronically through the link in Section III.B.1.* Proposals submitted by facsimile will not be accepted.

A log will be kept of the names of all Offeror organizations that submitted proposals. Pursuant to NMSA 1978, § 13-1-116, the contents of proposals shall not be disclosed to competing potential 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 the final required City of Santa Fe signatures on the contract(s) resulting from the procurement has been obtained.

## 7. Proposal Evaluation

An Evaluation Committee will perform the evaluation of proposals. This process will take place as indicated in Section II.A, Sequence of Events, depending upon the number of proposals received. During this time, the Central Purchasing Office or/and the Procurement Manager may initiate discussions with Offerors who submit responsive or potentially responsive proposals for the purpose of clarifying aspects of the proposals. However, proposals may be accepted and evaluated without such discussion. Discussions SHALL NOT be initiated by the Offerors.

## 8. Selection of Finalists

The Evaluation Committee will select, and the Procurement Manager will notify the finalist Offerors as per schedule Section II.A, Sequence of Events or as soon as possible thereafter. A schedule for Oral Presentation, if any, will be determined at this time.

Finalists will be comprised of the three (3) Offerors receiving the highest cumulative scores in the following Sections: Section IV.8.1 Organizational Experience, Section IV.B.2 Mandatory Specifications and Section IV.B.3.

## **9. Oral Presentations**

Finalist Offerors, as selected per Section II.8.9 above, may be required to conduct an oral presentation at a venue to be determined as per schedule Section II.A., Sequence of Events, or as soon as possible thereafter. If oral presentations are held, Finalist Offerors may make their presentations through electronic means (GoToMeeting, Zoom, etc.) or in person. The Department will provide Finalist Offerors with applicable details. Whether or not Oral Presentations will be held is at the discretion of the Evaluation Committee and Central Purchasing Office.

## **10. Finalize Contractual Agreements**

After approval of the Evaluation Committee Report, any contractual agreement(s) resulting from this RFP will be finalized with the most advantageous Offerer(s), taking into consideration the evaluation factors set forth in this RFP, as per Section II.A., 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(s) without undertaking a new procurement process.

## **11. Contract Awards**

Upon receipt of the signed contractual agreement, the Department will award as per Section II.A., Sequence of Events, or as soon as possible thereafter. The award is subject to appropriate Department and Governing Body approval.

## **12. Protest Deadline**

Any protest by an Offeror must be timely submitted and in conformance with NMSA 1978, § 13-1-172 and applicable procurement regulations. As a Protest Manager has been named in this Request for Proposals, pursuant to NMSA 1978, § 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 15th 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.**

**C. GENERAL REQUIREMENTS**

**1. Acceptance of Conditions Governing the Procurement**

Potential Offerors must indicate their acceptance of these Conditions Governing the Procurement, Section II.C, by completing and signing the Letter of Transmittal form, pursuant to the requirements in Section II.C.29, located in APPENDIX D.

**2. Incurring Cost**

Any cost incurred by the potential Offeror in preparation, transmittal, and/or presentation of any proposal or material submitted in response to this RFP shall be borne solely by the Offeror. Any cost incurred by the Offeror for set up and demonstration of the proposed equipment and/or system shall be borne solely by the Offeror.

**3. Prime Contractor Responsibility**

Any contractual agreement that may result from this RFP shall specify that the prime contractor is solely responsible for fulfillment of all requirements of the contractual agreement with the Department which may derive from this RFP. The Department entering into a contractual agreement with a vendor will make payments to only the prime contractor.

**4. Subcontractors/Consent**

The use of subcontractors is allowed. The prime contractor shall be wholly responsible for the entire performance of the contractual agreement whether or not subcontractors are used. Additionally, the prime contractor must receive approval, in writing, from the Department awarding any resultant contract, before any subcontractor is used during the term of this agreement.

**S. Amended Proposals**

An Offeror may submit an amended proposal before the deadline for receipt of proposals. Such amended proposals must be complete replacements for a previously submitted proposal and must be clearly identified as such in the transmittal letter. **The Department or the Central Purchasing Office personnel will not merge, collate, or assemble proposal materials.**

**6. Offeror's Rights to Withdraw Proposal**

Offerors will be allowed to withdraw their proposals at any time prior to the deadline for receipt of proposals. The Offeror must submit a written withdrawal request addressed to the Central Purchasing Office and the Procurement Manager and signed by the Offeror's duly authorized representative.

The approval or denial of withdrawal requests received after the deadline for receipt of the proposals is governed by the applicable procurement regulations.

## 7. Proposal Offer Firm

Responses to this RFP, including proposal prices for services, will be considered firm for one-hundred eighty (180) days after the due date for receipt of proposals or ninety (90) days after the due date for the receipt of a best and final offer, if the Offeror is invited or required to submit one.

## 8. Disclosure of Proposal Contents

The contents of all submitted proposals will be kept confidential until the final award has been completed by the City. At that time, all proposals and documents pertaining to the proposals will be available for public inspection, *except* for proprietary or confidential material as follows:

- a. ***Proprietary and Confidenda/, informadon is restricted to:***
  1. confidential financial information concerning the Offeror's organization; and
  2. information that qualifies as a tradeseecret in accordance with the Uniform Trade Secrets Act, §§57-3A-1 through 57-3A-7.
- b. An additional but separate redacted version of Offeror's proposal, as outlined and identified in Sections m.B.l.a.i, shall be submitted containing the blacked-out proprietary or confidential information, to facilitate eventual public inspection of the non-confidential version of Offeror's proposal.

**IMPORTANT:** The price of products offered, or the cost of services proposed **SHALL NOT** be designated as proprietary or confidential information.

If a request is received for disclosure of proprietary or confidential materials, the City Attorney and the Chief Procurement Officer shall examine the request and make a written determination that specifies which portions of the proposal should be disclosed. Unless the Offeror takes legal action to prevent the disclosure, the proposal will be so disclosed. The proposal shall be open to public inspection subject to any continuing prohibition on the disclosure of proprietary or confidential information.

## 9. No Obligation

This RFP in no manner obligates the City or any of its Departments to the use of any Offeror's services until a valid written contract is awarded and approved by appropriate authorities.

## 10. Termination

This RFP may be canceled at any time and all proposals may be rejected in whole or in part when the Department determines such action to be in the best interest of the City of Santa Fe.

## 11. Sufficient Appropriation

Any contract awarded as a result of this RFP process may be terminated if sufficient appropriations or authorizations do not exist. Such terminations will be affected by sending written notice to the contractor. The Department's decision as to whether

sufficient appropriations and authorizations are available will be accepted by the contractor as final.

## 12. Legal Review

The Department requires that all Offerors agree to be bound by the General Requirements contained in this RFP. Any Offeror's concerns must be promptly submitted in writing to the attention of the Central Purchasing Office and the Procurement Manager.

## 13. Governing Law

This RFP and any agreement with an Offeror which may result from this procurement shall be governed by the laws of the State of New Mexico.

## 14. Basis for Proposal

Only information supplied in writing by the Central Purchasing Office and the Procurement Manager or contained in this RFP shall be used as the basis for the preparation of Offeror proposals.

## ts. Contract Terms and Conditions

The contract between the Department and a contractor will follow the format specified by the City and contain the terms and conditions set forth in the Draft Contract Appendix G. However, the contracting Department reserves the right to negotiate provisions in addition to those contained in this RFP Draft Contract with any Offeror. The contents of this RFP, as revised and/or supplemented, and the successful Offeror's proposal will be incorporated into and become part of any resultant contract.

The City discourages exceptions from the contract terms and conditions as set forth in the RFP Draft Contract. Such exceptions may cause a proposal to be rejected as nonresponsive when, in the sole judgment of the City (and its evaluation team), the proposal appears to be conditioned on the exception, or correction of what is deemed to be a deficiency or an unacceptable exception is proposed which would require a substantial proposal rewrite to correct.

Should an Offeror object to any of the terms and conditions as set forth in the RFP Draft Contract (APPENDIX G) strongly enough to propose alternate terms and conditions in spite of the above, the Offeror must propose **specific** alternative language. The City may or may not accept the alternative language. General references to the Offeror's terms and conditions or attempts at complete substitutions of the Draft Contract are not acceptable to the City and will result in disqualification of the Offeror's proposal.

Offerors must provide a brief discussion of the purpose and impact, if any, of each proposed change followed by the specific proposed alternate wording.

If an Offeror fails to propose any alternate terms and conditions during the procurement process (the **RFP** process prior to selection as successful Offeror), no proposed alternate terms and conditions will be considered later during the negotiation process. Failure to propose alternate terms and conditions during the procurement process (the RFP process

prior to selection as successful Offeror) is an **explicit agreement** by the Offeror that the contractual terms and conditions contained herein are **accepted** by the Offeror.

## **16. Offeror's Terms and Conditions**

Offerors must submit with the proposal a complete set of any additional terms and conditions they expect to have included in a contract negotiated with the City. See Section II.C.15 for requirements.

## **17. Contract Deviations**

Any additional terms and conditions, which may be the subject of negotiation (such terms and conditions having been proposed during the procurement process, that is, the RFP process prior to selection as successful Offeror); will be discussed only between the City and the Offeror selected and shall not be deemed an opportunity to amend the Offeror's proposal.

## **18. Offeror Qualifications**

The Evaluation Committee may make such investigations as necessary to determine the ability of the potential Offeror to adhere to the requirements specified within this RFP. The Evaluation Committee will reject the proposal of any potential Offeror who is not a Responsible Offeror or fails to submit a Responsive Offer as defined in NMSA 1978, §§ 13-1-83 and 13-1-85.

## **19. Right to Waive Minor Irregularities**

The Evaluation Committee, upon approval from the Chief Procurement Officer, reserves the right to waive minor irregularities, as defined in Section I.F.26. The Evaluation Committee also reserves the right to waive mandatory requirements, provided that **all** of the otherwise responsive proposals failed to meet the same mandatory requirements and the failure to do so does not otherwise materially affect the procurement. This right is at the sole discretion of the Evaluation Committee.

## **20. Change in Contractor Representatives**

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

## **21. Notice of Penalties**

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

## **22. Department Rights**

The Department., in agreement with the Evaluation Committee, reserves the right to accept all or a portion of a potential Offeror's proposal.

### **23. Right to Publish**

Throughout the duration of this procurement process and contract term, Offerors and contractors must secure from the City written approval prior to the release of any information that pertains to the potential work or activities covered by this procurement and/or City contracts deriving from this procurement. Failure to adhere to this requirement may result in disqualification of the Offeror's proposal or removal from the contract.

### **24. Ownership of Proposals**

All documents submitted in response to the RFP shall become property of the City. If the RFP is cancelled, all responses received shall be destroyed by the Central Purchasing Office unless the Offeror either picks up, or arranges for pick-up, the materials within three (3) business days of notification of the cancellation. Offeror is responsible for all costs involved in return mailing/shipping of proposals.

### **25. Confidentiality**

Any confidential information provided to, or developed by, the contractor in the performance of the contract resulting from this RFP 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.

The Contractor(s) agrees to protect the confidentiality of all confidential information and not to publish or disclose such information to any third party without the City's written permission.

### **26. Electronic mail address required**

A large part of the communication regarding this procurement will be conducted by electronic mail (email). Offeror must have a valid email address to receive this correspondence. (See also Section II.B.5, Response to Written Questions).

### **27. Use of Electronic Versions of this RFP**

This RFP is being made available by electronic means. In the event of conflict between a version of the RFP in the Offeror's possession and the version maintained by the Central Purchasing Office, the Offeror acknowledges that the version maintained by the Central Purchasing Office shall govern. Please refer to: [https://www.santafenm.g.ov/bids\\_rfps](https://www.santafenm.g.ov/bids_rfps)

### **28. Campaign Contribution Disclosure Form**

Offeror must complete, sign, and return the Campaign Contribution Disclosure Form, APPENDIX B, as a part of their proposal. This requirement applies regardless of whether a covered contribution was made or not made for the positions of Governor and Lieutenant Governor, City Officials or other identified official. **Failure to complete and return the signed, unaltered form will result in Offeror's disqualification.**

### **29. Letter of Transmittal**

Offeror's proposal must be accompanied by an **unaltered** Letter of Transmittal Form (APPENDIX D), which should be **completed** and **signed** by the individual authorized to

contractually obligate the company, identified in #2 below. **DO NOT LEAVE ANY OF THE ITEMS ON THE FORM BLANK** (N/A, None, Does not apply, etc. are acceptable responses).

The Letter of Transmittal MUST:

1. Identify the submitting business entity (its Name, Mailing Address and Phone Number);
2. Identify the Name, Title, Telephone, and Email address of the person authorized by the Offeror's organization to (A) contractually obligate the business entity providing the Offer, (B) negotiate a contract on behalf of the organization; and/or (C) provide clarifications or answer questions regarding the Offeror's proposal content (*A response to B and/or C is only required if the responses differs from the individual identified in A*);
3. Identify sub-contractors, if any, anticipated to be utilized in the performance of any resultant contract award;
4. Describe any relationship with any other entity (such as City, County, State Agency, reseller, etc., that is not a sub-contractor identified in #3), if any, which will be used in the performance of this awarded contract; and
5. Be signed and dated by the person identified in #2 above; attesting to the veracity of the information provided and acknowledging (a) the organization's acceptance of the Conditions Governing the Procurement stated in Section II.C.1, (b) the organization's acceptance of the Section V Evaluation Factors, and (c) receipt of all amendments to the RFP.

### **30. Disclosure Regarding Responsibility**

- A. Any prospective Contractor and any of its Principals who enter into a contract greater than sixty thousand dollars (\$60,000.00) with any state agency or local public body for professional services, tangible personal property, services or construction agrees to disclose whether the Contractor, or any principal of the Contractor's company:
  1. is presently debarred, suspended, proposed for debarment, or declared ineligible for award of contract by any federal entity, state agency or local public body;
  2. has within a three-year period preceding this offer, been convicted in a criminal matter or had a civil judgment rendered against them for:
    - a. the commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) contract or subcontract;
    - b. violation of Federal or state antitrust statutes related to the submission of offers; or
    - c. the commission in any federal or state jurisdiction of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violation of Federal criminal tax law, or receiving stolen property;

3. is presently indicted for, or otherwise criminally or civilly charged by any (federal state or local) government entity with the commission of any of the offenses enumerated in paragraph A of this disclosure;
  4. has, preceding this offer, been notified of any delinquent Federal or state taxes in an amount that exceeds \$3,000.00 of which the liability remains unsatisfied. Taxes are considered delinquent if the following criteria apply.
    - a. The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge of the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.
    - b. The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.
    - c. Have within a three-year period preceding this offer, had one or more contracts terminated for default by any federal or state agency or local public body.)
- B. Principal, for the purpose of this disclosure, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity or related entities.
- C. The Contractor shall provide immediate written notice to the Chief Procurement Officer or other party to this Agreement if, at any time during the term of this Agreement, the Contractor learns that the Contractor's disclosure was at any time erroneous or became erroneous by reason of changed circumstances.
- D. A disclosure that any of the items in this requirement exist will not necessarily result in termination of this Agreement. However, the disclosure will be considered in the determination of the Contractor's responsibility and ability to perform under this Agreement. Failure of the Contractor to furnish a disclosure or provide additional information as requested will render the Offeror nonresponsive.
- E. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the disclosure required by this document. The knowledge and information of a Contractor is not required to exceed that which is the normally possessed by a prudent person in the ordinary course of business dealings.
- F. The disclosure requirement provided is a material representation of fact upon which reliance was placed when making an award and is a continuing material representation of the facts during the term of this Agreement. If during the performance of the contract, the Contractor is indicted for or otherwise criminally or civilly charged by any government entity (federal, state, or local) with commission of any offenses named in this document the Contractor must provide immediate written notice to the Chief Procurement Officer or other party to this Agreement. If it is later determined that the

Contractor knowingly rendered an erroneous disclosure, in addition to other remedies available to the Government, the Chief Procurement Officer may terminate the involved contract for cause. Still further the Chief Procurement Officer may suspend or debar the Contractor from eligibility for future solicitations until such time as the matter is resolved to the satisfaction of the Chief Procurement Officer

### **31. Local Preferences**

The City recognizes the value of revenue derived from local businesses and shall procure goods and/or services locally, when possible, pursuant to Ordinance and the City of Santa Fe Procurement Manual, except for purchases using City, state, and federal grant funds. Applicable City, state and federal law and regulations govern procurements using City, state, or federal funds.

#### **A. Local Preference Qualification**

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 bid or proposal, showing that the business is located within the Santa Fe municipal limits. If an offer is received without a copy of the appropriate State of New Mexico Taxation and Revenue Department issued Business Registration Certificate, the preference will not be applied. A valid resident business certificate is issued by the Taxation and Revenue Department pursuant to NMSA 1978, § 13-1-22.

- a. When the City makes a purchase using a formal request for proposals process, not including contracts awarded on a point-based system, the City shall award an additional 6% 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 non-local resident business who has hired all local 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 point's equivalent to 6% of the total possible points to a local resident business. The City shall award an additional 3% of the total possible points to a business who has hired all local resident business subcontractors.

The maximum available local preference shall be 6%.

#### **B. Solicitations above One Million Dollars (\$1,000,000)**

1. The City shall deem a bid or 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.
2. The City shall deem the bid or 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.

### 32. Living Wage

Compliance with the City of Santa Fe and Santa Fe County's Minimum Wage Rate Ordinances (Living Wage Ordinances). The vendor must comply with the current living wage rate and requirements posted on this page <https://santafenm.gov/economic-development/business-resources/living-wage-information>

## ID. 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 Responses

**Proposals in response to this RFP must be submitted through City of Santa Fe's Purchasing submission link ONLY.** The Offeror need only submit one single electronic copy of each portion of its proposal (Technical and Cost) as outlined below.

Proposals must be submitted in the manner outlined below. Technical and Cost portions of Offerors proposal **!!!!!!** be submitted in separate uploads as indicated below in this section, and **must** be prominently identified as "Technical Proposal," or "Cost Proposal," on the front page of each upload.

- a) **Technical Proposals-One** (1) ELECTRONIC upload must be organized in accordance with **Section ID.C.1. Proposal Format**. All information for the Technical Proposal **must be combined into a single file/document for uploading**. The Technical Proposals **SHALL NOT** contain any cost information. **Name the file as such, RFP Number- Company Name - Technical (e.g., 24/20/P - Acme Corp- Technical)**
- i. **Confidential Information:** If Offeror's proposal contains confidential information, as defined in Section I.F.6 and detailed in Section II.C.8, Offeror **must** submit **two (2) separate ELECTRONIC technical files. Name the files accordingly:**
- One (1) ELECTRONIC version of the requisite proposals identified above as **unredacted** (def. Section 1F39) versions for evaluation purposes (example file name, 24/20/P -Acme Corp- Unredacted Technical); and
  - One (1) **redacted** (def. Section I.F.30) ELECTRONIC. for the public file, in order to facilitate eventual public inspection of the non-confidential version of Offeror's proposal. Redacted versions **must** be clearly marked as "REDACTED" or "CONFIDENTIAL" on the first page of the electronic file. (Example file name, 24/20/P -Acme Corp-Redacted Technical)

- b) **Cost Proposals** - One (1) ELECTRONIC upload of the proposal containing **ONLY** the Cost Proposal. All information for the cost proposal **must be combined into a single file/document for uploading.** Name the file as such, RFP Number- Company Name- Cost (e.g., 24/20/P - Acme Corp- Cost)

**The ELECTRONIC proposal submission must be fully submitted to:**

**<https://cityofsantafenm.sharefile.com/r-r6o1.99d2a9809454Sa0fc75efdb!J11f9b>** by the submission deadline in Section II.B.6. Submissions cannot be password protected and **must be a 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, on server by any anti-virus or other security software will be deemed late.*

**LATE PROPOSALS WILL NOT BE ACCEPTED**

Any proposal that does not adhere to the requirements of this Section and **Section m.C.1 Proposal Content and Organization** may be deemed non-responsive and rejected on that basis.

## **C. PROPOSAL FORMAT**

All proposals must be submitted as follows:

Organization of files/envelopes for electronic copy proposals:

### **1. Proposal Content and Organization**

Direct reference to pre-prepared or promotional material may be used if referenced and clearly marked. Promotional material must be minimal. The proposal must be organized and indexed in the following format and must contain, at a minimum, all listed items in the sequence indicated.

**Technical Proposal-DO NOT INCLUDE ANY COST INFORMATION IN THE TECHNICAL PROPOSAL.**

- A. Signed Letter of Transmittal
- B. Signed Campaign Contribution Form
- C. Table of Contents
- D. Proposal Summary (Optional)
- E. Response to Contract Terms and Conditions (from Section II.C.15)
- F. Offeror's Additional Terms and Conditions (from Section II.C.16)
- G. Response to Specifications (**except Cost information which shall be included ONLY in Cost Proposal/Binder 2**)
  1. Organizational Experience
  2. Oral Presentation (if applicable)
  3. Mandatory Specification
  4. Desirable Specification

- 5. Local Preferences (if applicable)
- H. Other Supporting Material (if applicable)

**Cost Proposal:**

- 1. Completed Cost Response Form (APPENDIX C)

Within each section of the proposal, Offerors should address the items in the order indicated above. All forms provided in this RFP must be thoroughly completed and included in the appropriate section of the proposal. **All discussion of proposed costs, rates or expenses must occur ONLY in the Cost Proposal.**

A Proposal Summary may be included in Offeror's Technical Proposal, to provide the Evaluation Committee with an overview of the proposal; however, this material will not be used in the evaluation process unless specifically referenced from other portions of the Offeror's proposal. **DO NOT INCLUDE COST INFORMATION IN THE PROPOSAL SUMMARY.**

## **IV. SPECIFICATIONS**

### **A. GOALS**

The revised General Plan is intended to capture the desired vision and choices related to Santa Fe's future with a 20-year plan that will identify opportunities for beneficial use of the community's resources and guide the advancement of the community. This vision will be accomplished through the implementation of dynamic growth guidance strategies and actionable implementation steps in the interest of ensuring a vibrant sense of place and belonging. These strategies and implementation steps will reflect and promote overarching community values, trends and themes, and correlate concepts such as sustainability, preservation of and access to resources, community and cultural engagement, connectivity, affordability, economic opportunity and prosperity, equity, inclusion, and regional partnerships.

The General Plan will identify desired and attainable goals, each with a set of quantifiable objectives which are correlated with the implementation plan.

To achieve this vision, the City aspires to the following goals:

- 1) Enhance the City's quality of life by ensuring that development is sustainable, and that social equity, physical growth, redevelopment, and natural resource conservation and protection are balanced, guided and dynamic.
- 2) Foster the Santa Fe tradition which enriches everyday life by designing urban spaces conducive to exceptional community character, public safety, and establishing an ecological conservation basis for urban design while continuing to honor beneficial existing growth patterns.
- 3) Promote a compact urban form that enables the development of affordable housing, provides a mix of housing types and land uses in all areas of the city.
- 4) Promotes the stabilization of neighborhoods by implementing policies and programs that prevent residential and small business displacement.
- 5) Develop a sector planning process that promotes community cohesion, shared ownership and sense of place.
- 6) Reduce automobile dependence by becoming a city where essential goods, services, employment and amenities are available to residents within their neighborhood. Improve transportation network connectivity and provide equitable access to affordable and multimodal transportation that connects underserved communities to services and employment.
- 7) Diversify the economy while enhancing the city's unique character and sense of place.
- 8) Develop a regional growth management policy framework in collaboration with regional partners.
- 9) Promote engagement with regional partners to ensure coordinated growth and development, and annexation and expansion at the City's periphery.
- 10) Develop a comprehensive and enforceable review process that balances the goals of the General Plan when determining planning and development decisions.
- 11) Develop an implementation plan that creates a consistency of purpose across City departments.
- 12) Promote reconciliation of detrimental inconsistencies, disparities and inequities within the city and among its residents.

## **B. OBJECTIVES**

In order to accomplish these goals, the City intends to engage in the General Plan Update, including an extensive community outreach program, that will identify quantifiable and achievable objectives that help answer the following questions:

- 1) "What's missing and where?" - Identify perceived challenges and shared objectives.
- 2) "Who is it for and how will it help them?" - Identify connections and sources of mutual benefit to the community that promote cohesion and take advantage of opportunities to enhance shared sense of place.
- 3) "What are we trying to deliver and how will it be provided?" - Identify the balance of measures for implementation that best promote, benefit and incentivize livability, equity, health and wellness across the spectrum of the demographic and economic landscape.

## **C. ASSUMPTIONS**

### **City Staff and Consultant Support:**

City staff from the Land Use and Planning Department will actively manage and participate in the revision. The staff will provide all existing data, plans and reports, Geographic Information System (GIS) mapping, and will assist in the reproduction and distribution of materials including mailings, meeting set-up, and other logistical and administrative functions.

City staff will coordinate meeting logistics with any working group, stakeholder group, or committee that may be agreed upon during Task 1. Consultant and City staff will conduct bi-weekly (or as needed) project management meetings (via video conference call) to address project management issues. During especially intense periods, these meetings may take place weekly. Consultant will produce monthly written (PDF format) status reports including a summary of all project activity and core related invoicing prior to monthly meetings that will be attached to meeting agendas and monthly invoices.

### **Statutory Requirements:**

The General Plan Update will exceed the minimum State of New Mexico Statute requirements outlined in Chapter 3 - Municipalities, Article 19-Planning and Planning and Section 3-19-11 - Legal status of master plan and 3-19-1 - Creation of a Planning Commission and all related "Annotations."

### **Scope of Service Tasks:**

It is the intent of the Scope of Service Tasks (as described in Section D, "Detailed Scope of Work") to provide an essential framework of desired deliverables from the project. The General Plan Update consultant is expected to collaborate with the Land Development Code update project team across all three phases, but particularly in Phase 3, where the code will be amended to reflect the goals and policies identified in the General Plan update project. The full Land Development Code project scope is listed in Section 1 G. Procurement Library.

## **D. DETAILED SCOPE OF WORK**

### **PHASE 1**

Approximately 12 months

#### **Task 1. Administrative Coordination:**

The City is seeking the best approach, process and best practices to develop the update, communication protocol, and an internal meeting schedule in coordination with City staff as outlined below.

- 1) Project Team Kick-Off and Pre,...planning Coordination, including:
  - a) Define and come to agreement on the General Plan Update development approach, process outline and best practices.
  - b) Establish methods of communication and content sharing.
  - c) Develop agreed upon plan development groups, engagement partners and strategies, committees, stakeholders that will be part of the development of the plan.
  - d) Conduct in-person introductions and tours as needed. Work with City staff and leadership to evaluate current long-range planning practices and develop strategies to optimize internal workflows and planning activity outcomes.

#### **Task 2. Existing Conditions and Trends**

The City is looking for a baseline of information on existing conditions, including identification of key issues, problems and long-range goals. The City staff will provide all necessary existing materials, data and documentation. The consultant's responsibility will be to analyze this data and document the findings, and to conduct research, outreach, etc. and production of deliverables listed below. All maps will be done within the ArcGIS Software family and will be made compatible with existing City mapping systems.

The analysis should include but is not limited to mapping, surveys, studies, assessments and analysis of the following:

- 1) **Base Mapping**
- 2) **Regional Trends**
  - a) Population and Growth Trends
  - b) Demographic trends
- 3) **Land Capability Analysis**
- 4) **Existing Land Use and Development:**
  - a) Identify developable **land**, including infill and redevelopment
- 5) **Neighborhoods:** Develop an official "Neighborhood and Districts" map for the City.
  - a) **Downtown:** Conduct a more granular survey and analysis of downtown Santa Fe.
- 6) **Fiscal Sustainability:**
  - a) Include a "value per acre" analysis or similar analysis.
- 7) **Urban Design**
- 8) **Transportation**
- 9) **Public and Private Utilities**
- 10) **Historical and Cultural Facilities**

- 11) **Public Safety**
- 12) **Schools**
- 13) **Parks and Recreation**
- 14) **Housing**
- 15) **Economic Development Assessment**
- 16) **Environmental Stewardship\Natural Resources**
- 17) **Institutional Structures:**
  - a) Ongoing planning efforts and their sponsor departments/jurisdictions.

**Assessment report:** The findings resulting from analysis of the above items will be summarized in a written (PDF format) Assessment Report. The findings will identify relevant planning issues, a summary of the findings, and policy implications for the General Plan. The report will be reviewed by the appropriate groups/committees as well as the public. It will be published on the project website where the public will be able to make comments and recommendations based on the report's findings.

### **Task 3. Digital User Platform (development and refinement to continue through all phases)**

The City seeks a web-based dynamic interface tool that will enable staff, elected officials, the public, developers and stakeholders to access a user-friendly on-line version of the General Plan. The platform will become the Planning and Development Hub for the City after the General Plan is adopted, and therefore must be accessible and updatable by City staff.

- 1) The platform must include all maps, data and studies. The maps, data and studies should take advantage of ESRI Storymaps or similar technology to be interactive and easily understood.
- 2) The platform will integrate other adopted City plans, including the plan texts and map components such as the Residential Pipeline Map, Bicycle Master Plan, the Pedestrian Master Plan, the Water Plan, etc. The General Plan components should be included as map layers so they can be overlaid with components from other plans.
- 3) The platform will include an engagement section that becomes the main hub for digital engagement for the Planning and Land Use Department.
- 4) The platform will be built in such a way that other planning projects such as the Land Development Code website and permit searches can easily be integrated.
- 5) The platform will include a backend, dashboard-style user interface that enables City staff to run reports and manage the General Plan project.
- 6) The platform will be built with translation and accessibility options that meet City engagement standards.

## **PBASE2**

Approximately 6 months (in tandem with LDC update Phase 2)

### **Task 4. Public Engagement Plan**

The coordination and execution of community outreach and engagement cannot be understated as a crucial component to the success of this project. Based on Public Engagement Plans submitted by the Consultant, a special coordination meeting shall occur to be determined in Task 1 for the purpose of refining the General Plan so that each stakeholder consents to it and has a role in its success.

- 1) The Public Engagement Plan should include the following elements:

- a) Inclusive meeting provisions, such as
    - i) Food and refreshments
    - ii) Childcare
    - iii) Interpretationservices
    - iv) Youth-oriented activities and meetings
    - v) Larger events may have live entertainment to attract a wider audience
    - vi) Collaboration with community partners such as churches, schools and organizations
  - b) Plan to coordinate with City staff, leadership, local organizations, and project Consultants to recruit equity representatives to drive engagement in their community, attend public meetings, and participate in working groups/committees.
    - i) Representatives should be from an underrepresented community, such as Spanish speaking, indigenous, youth, low-income, etc.
    - ii) The plan should recommend payment structure for equity representatives.
  - c) Review and consider Culture, History, Art, Reconciliation and Truth (CHART) outcomes
  - d) Review and consider Midtown outreach outcomes.
- 2) The consultant should provide local engagement and Public Relations (PR) support. subcontracted by the offerors.
- a) The PR team will work directly with City of Santa Fe Communications and Public Engagement teams to develop outreach materials that meet City standards.
  - b) The Public Engagement Plan will be developed using the forthcoming City of Santa Fe Community Engagement Guide to craft all engagement materials. The City Clerk's office is expected to adopt the Engagement Guide in the coming months and will be shared with the project team at that time.
  - c) The **PR** team will provide all project engagement materials in both English and Spanish and meet City accessibility standards for online and in-person engagement.
  - d) The PR team will partner with local community-based organizations to conduct targeted engagement activities.

**Task S. Assessment Report**

- Create a report on the engagement findings and identify the City's short-term and long-term needs and desires.
- The report should include a summary of findings from Task 2, Existing Conditions and Trends, a summary of findings from Task 4, Public Engagement, and a narrative description of the steps that should be taken to address those findings.

**PHASE3**

Approximately 24 months (in tandem with LDC update phase 3)

**Task 6. Growth Scenario Planning**

Utilizing previous tasks analysis and engagement, the Consultant will develop several future growth scenarios for future land use and development patterns. The Consultant will use dynamic visualization and analysis techniques to communicate the outcomes of each scenario to the City and the public. These scenarios will be used throughout the planning draft process to demonstrate the outcomes of proposed planning policies.

## Task 7. General Plan Draft

The consultant will prepare the first draft of the General Plan. The draft shall include analysis and recommendations for each of the topics listed below. Other than certain required sections, the General Plan may be organized in a manner that best suits the project's overall goals, the vision of the project team and the consultant's workflow as approved by City Staff.

- 1) Executive Summary (required)
- 2) Introduction, Vision & Themes
- 3) Existing Conditions and Trends
  - a) See "Task 2" above.
- 4) Assessment Report (required)
  - a) Report engagement findings and identify of the City's short-term and long-term needs and desires.
- 5) Land Use and Growth Scenarios (see "Task 6" above)
  - a) Develop the Future Land Use Map based on collaboration with Land Development Code Rewrite team and goals and objectives determined in this General Plan. Integrate Future Land Use Map into Digital User Platform to demonstrate the connection to other elements of the General Plan.
- 6) Regional Planning
  - a) Priorities, major projects and organizational structures.
- 7) City Character
  - a) Provide updated analysis of existing City Character, emphasizing areas of the City outside of historic overlays (Historic-area character is already well established and documented, only needs to be updated with current conditions.)
  - b) Identify desired urban form for all areas of the City, coinciding with existing neighborhood boundaries, opportunity zones, redevelopment areas, master planned areas, and other contextual information.
- 8) Sector and Special Area Planning
  - a) Identify areas for future Sector and Special Area scale planning.
  - b) Develop strategies for Special Areas places for locals in addition to tourists.
  - c) Assess Special Areas at granular level including economic activity, mobility, urban design and housing.
  - d) Propose "catalyzing" City-led redevelopment projects of city owned property and Right of Way (R.O.W.) to be incorporated into sector plans.
- 9) Mobility and Accessibility
  - a) Integrate goals existing plans including Multimodal Transition Plan, Bicycle/Ped/Transit Plans, Sustainability Plan
  - b) Using recommendations from existing plans, identify quantifiable targets for transportation mode-shift.
    - i) Identify quantifiable targets for infrastructure improvements to achieve mode-shift.
  - c) Develop a "Connectivity and Street Network" map that requires future development to adhere to a street network that creates permeable, publicly accessible new development and improves connectivity in existing neighborhoods.
- 10) Infrastructure and Facilities

- a) Integrate various infrastructure and facility plans to ensure various Capital projects are optimized and not redundant.
  - b) Identify infrastructure needs and desires such as improved internet, areas to extend utilities, etc.
  - c) Using ongoing facilities evaluation, identify top priorities for new facilities and facility improvements.
  - d) Evaluate Green Infrastructure and recommend improvements.
- 11) Climate and Natural Resources
- a) Integrate relevant plans (such as water and sustainability plans) and correlate with goals and objectives of the General Plan.
- 12) Affordability and Human Services
- a) Integrate various Human Service plans such as Senior Services, Youth and Family Services, Recreation Plans
  - b) Make recommendations for additional affordable housing tools
  - c) Make "Affordable Living" recommendations that address other aspects of affordability beyond housing.
- 13) Development Review Guidelines
- a) Develop review processes to assess private and public development for compliance with the General Plan.
- 14) Glossary
- 15) Appendices

### **Task 8. Implementation and Administration Plan**

Develop an Implementation Plan with the following components:

- a) Provide detailed Implementation Plan that ties each recommendation to achievable goals and objectives.
  - i) Each goal/objective should include proposed cost, departmental responsibility, and timeline.

Administration Plans should include procedures for the following:

- i) **Annual** progress and action reports
- ii) C.I.P. Plan update process
- iii) 5-year reviews
- iv) 20-year update timeline from planned adoption year
- v) Identify 40-80+ year elements

### **Task 9. Plan Adoption and Publication**

The consultants will work in tandem with City staff and City leadership throughout the duration of the General Plan adoption process. The General Plan adoption related responsibilities include but are not limited to:

- i) Attend and present to commissions, board and the governing body.
- ii) Respond to questions from the public, City staff and leadership regarding all aspects of the General Plan
- iii) Make any amendments necessary that are identified during the adoption process.
- iv) Assist with the transition to the new General Plan as necessary.

After adoption, the consultants will be responsible for the publication of General Plan, including:

- i) Providing hard copies to the City and stakeholders if desired
- ii) Publishing the final adopted General Plan to the project website.
- iii) Finalizing any other aspects of the project.

## **B . TECHNICAL SPECIFICATIONS**

### **1. Organizational Experience**

Offeror **must**:

- a) provide a detailed description of at least three (3) relevant projects with city, county or state governments or the private sector. The experience of all proposed subcontractors must *be* described. The narrative **must** thoroughly describe how the Offeror has supplied expertise for similar contracts and must include the extent of their experience, expertise and knowledge as a provider of comprehensive and community planning consultation. All comprehensive, land use and community planning consultation provided to private sector will also be considered.
- b) provide a brief resume for all key personnel Offeror proposes to use in performance of the resulting contract, should Offeror be awarded. Key personnel is identified as the Project Principal (or equivalent), project planners, graphic, technology and administrative support staff. Offeror must include key personnel education, work experience and relevant certifications/licenses.

### **2. Mandatory Specification**

The Offeror's proposal must:

- a. Demonstrate a proven track record of General Plan rewrites (or Comprehensive Plan, Master Plan, etc. of a similar scope to this project) for municipalities of comparable size to Santa Fe. Offeror should give a detailed explanation of the municipalities they have provided service for and the size of the municipality.
- b. Describe their knowledge and philosophies related to comprehensive planning in a contemporary municipal setting and how that knowledge and philosophy is aligned with City of Santa Fe goals, objectives, assumptions and scope of work as stated in this RFP.
- c. Explain how they have demonstrated the ability to successfully collaborate with City staff, leadership, the public and other consulting firms working on concurrent projects relevant to a General Plan Rewrite Project.
- d. Provide a detailed description of how the offeror will complete the phases and tasks listed in Section *N.D.* taking into account the City's Goals, Objectives and Assumptions. In particular, the description must include:
  - 1. Detailed description of Digital User Platform including platform, integration with City ITT, and scope.

- ii. Detailed description of scenario planning tools including platform, methods, integration in the Digital User Platform and relation to the General Plan Draft as identified in Task 7.
  - iii. Proposed outline of the General Plan Draft demonstrating inclusion of all topics identified in Task 7.
- e. The description for Phase 3 must detail how the Offeror will be integrating the concurrent Land Development Code Rewrite project.

### 3. Desirable Specification

- a. Offeror should demonstrate a proven track record of General Plan rewrites (or Comprehensive Plan, Master Plan, etc. of a similar scope to this project) for municipalities of comparable size to Santa Fe. Offeror should give a detailed explanation of the municipalities they have provided service for and the size of the municipality.
- b. Offeror should describe their knowledge and philosophies related to comprehensive planning in a contemporary municipal setting and how that knowledge and philosophy is aligned with City of Santa Fe goals and the General Plan as stated in this RFP.
- c. Offeror should explain how they have demonstrated the ability to successfully collaborate with City staff, leadership, the public and other consulting firms working on concurrent projects relevant to the General Plan Rewrite Project.
- d. Offeror should explain their specific understanding of the City of Santa Fe's unique history, geographic context and social climate. The offeror should include any experience working with Spanish speaking and minority communities.
- e. Offeror is encouraged to include alternatives based on the Offeror's expertise, past successes and proven outcomes that support the City's vision, goals and objectives.

## C. BUSINESS SPECIFICATIONS

### 1. Letter of Transmittal Form

The Offeror's proposal **must** be accompanied by the Letter of Transmittal Form located in APPENDIX D. The form must be signed by the person authorized to obligate the company.

### 2. Campaign Contribution Disclosure Form

The Offeror must complete an unaltered Campaign Contribution Disclosure Form and submit a signed copy with the Offeror's proposal. This must be accomplished whether or

not an applicable contribution has been made. (See APPENDIX B). **Failure to complete and return thesh:ned, unaltered form will result in Offeror's disqualification.**

**3. Oral Presentation**

If selected as a finalist, Offerors agree to provide the Evaluation Committee the opportunity to interview proposed staff members identified by the Evaluation Committee, at the option of the Department. The Evaluation Committee may request a finalist to provide an oral presentation of the proposal as an opportunity for the Evaluation Committee to ask questions and seek clarifications.

**4. Cost**

Offerors must complete the Cost Response Form in APPENDIX C. Cost will be measured by the total cost of all three phases as shown on the Cost Response Form.

**5. Local Preference**

To ensure adequate consideration and application of NMSA 1978, § 13-1-21, Offerors **MUST** include a copy, in this section, of its NM Resident preference certificate, as issued by the New Mexico Taxation and Revenue Department.

## V. EVALUATION

### A. EVALUATION POINT SUMMARY

The following is a summary of evaluation factors with point values assigned to each. These weighted factors will be used in the evaluation of individual potential Offeror proposals by sub-category.

| <b>Evaluation Factors</b><br><i>(Correspond to section IV.B and IV.C)</i>       | <b>Points Available</b> |
|---|-------------------------|
| <b>B. Technical Specifications</b>  |                         |
| B.1. Organizational Experience  | 200                     |
| B. 2. Mandatory Specification   | 250                     |
| B. 3. Desirable Specification   | 200                     |
| <b>C. Business Specifications</b>   |                         |
| C.1. Letter Of Transmittal  | Pass/Fail               |
| C.2. Campaign Contribution Disclosure Form                                      | Pass/Fail               |
| C.3. Oral Presentations   | 200                     |
| C.4. Cost   | 150                     |
| <b>TOTAL POINTS AVAILABLE</b>   | <b>1000</b>             |
| C.5. City of Santa Fe Local Preference per Section NC. 2                        | <b>60</b>               |
| C.5. City of Santa Fe Local Preference using Local Subcontractors Section N C.2 | <b>30</b>               |

Table 1: Evaluation Point Summary

### B. EVALUATION FACTORS

#### 1. B.1 Organizational Experience (See Table 1)

Points will be awarded based on the thoroughness and clarity of Offeror's response in this Section. The Evaluation Committee will also weigh the relevancy and extent of Offeror's experience, expertise and knowledge; and of personnel education, experience and certifications/licenses.

#### 2. B.2 Mandatory Specifications

Points will be awarded based on the thoroughness and clarity of Offeror's response in this Section. The Evaluation Committee will also weigh the relevancy and extent of Offeror's response to each mandatory specification and how well it was explained.

#### 3. B.3 Desirable Specifications

Points will be awarded based on the thoroughness and clarity of Offeror's response in this Section. The Evaluation Committee will also weigh the extent of Offeror's knowledge of Santa Fe and working with spanish speaking and minority communities.

**4. C.1 Letter of Transmittal (See Table 1)**

Pass/Fail only. No points assigned.

**5. C.2 Campaign Contribution Disclosure Form (See Table 1)**

Pass/Fail only. No points assigned.

**6. C.3 Oral Presentation (See Table 1)**

Points will be awarded based on the quality, organization and effectiveness of communication of the information presented, as well as the professionalism of the presenters and technical knowledge of the proposed staff. Prior to Oral Presentation, the Department will provide the Offeror a presentation agenda. (If no Oral Presentations are held, all Offerors will receive the maximum total points available for this Evaluation Factor).

**7. C.4 Cost (See Table 1)**

The evaluation of each Offeror's cost proposal will be conducted using the following formula: The formula below will use the total cost of all three phase as shown in the Cost Response Form in this RFP.

Lowest Responsive Offeror's Cost

X Available Award Points

Each Offeror's Cost

**8. C.5. Local Preferences**

Percentages will be determined based upon the point-based system outlined below.

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 bid or proposal, showing that the business is located within the Santa Fe municipal limits. If an offer is received without a copy of the appropriate State of New Mexico Taxation and Revenue Department issued Business Registration Certificate, the preference will not be applied. A valid resident business certificate is issued by the Taxation and Revenue Department pursuant to NMSA 1978, § 13-1-22.

- A. When the City makes a purchase using a formal request for proposals process, not including contracts awarded on a point-based system, the City shall award additional 6% 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 non-local resident business who has hired all local 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 point's equivalent to 6% of the total possible points to a local resident business. The City shall award an additional 3% of the total possible points to a business who has hired all local resident business subcontractors..

The maximum available local preference shall be 6%.

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

1. The City shall deem a bid or 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.
2. The City shall deem the bid or 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 subcontracted services go to subcontractors who are resident businesses.

**C. EVALUATION PROCESS**

- I. All Offeror proposals will be reviewed for compliance with the requirements and specifications stated within the RFP. Proposals deemed non-responsive will be eliminated from further consideration.
2. The Central Purchasing Office or/and the Procurement Manager may contact the Offeror for clarification of the response as specified in Section II. B.7.
3. Responsive proposals will be evaluated on the factors in Section IV, which have been assigned a point value in Section V. 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 Section V will be recommended for award (as specified in Section II.B.11). Please note, however, that a serious deficiency in the response to any one factor may be grounds for rejection regardless of overall score.

**APPENDIX A**  
**ACKNOWLEDGEMENT OF RECEIPT FORM**

**REQUEST FOR PROPOSALS**  
**General Plan Update**  
**24/20/P**  
**ACKNOWLEDGEMENT OF RECEIPT FORM**

This Acknowledgement of Receipt Form should be signed and submitted no later than 3.00pm MDT on November 1, 2023. Only potential Offerors who elect to return this form will receive copies of all submitted questions and the written responses to those questions, as well as any RFP amendments, if any are issued.

In acknowledgement of receipt of this Request for Proposals, the undersigned agrees that he or she has received a complete copy of the RFP, beginning with the title page, and ending with APPENDIX G.

The name and address below will be used for all correspondence related to the Request for Proposals.

ORGANIZATION: \_\_\_\_\_

CONTACT NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_ PHONE NO.: \_\_\_\_\_

EMAIL: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

**Submit Acknowledgement of Receipt Form to:**  
To: Central Purchasing  
Email: Purchasing\_RFP@santafenm.gov  
Subject Line: General Plan (Comprehensive/Master plan) Update RFP # **24/20/P**

**APPENDIXB**  
**CAMPAIGN CONTRIBUTION DISCLOSURE FORM**

## CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, §§ 13-1-28) and 13-1-191.1, as amended by Laws of 2007, Chapter 234, 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, § 13-1-181 or a contract that is executed may be ratified or terminated pursuant to NMSA 1978, § 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, §§ 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:**

- Mayor Alan M Webber
- Councilor Signe Lindell, Pro-tern
- Councilor Renee Villarreal
- Councilor Michael Garcia
- Councilor Carol Romero-Wirth
- Councilor Lee Garcia
- Councilor Christopher Rivera
- Councilor Amanda Chavez
- Councilor Jaime Cassutt

**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)

**APPENDIXC**  
**COST RESPONSE FORM**

## APPENDIX C COST RESPONSE FORM

| Description   | Estimated Hours | Cost |
|---|-----------------|------|
| Task 1: Administrative Coordination                 |                 |      |
| Task 2: Existing Conditions and Trends              |                 |      |
| Task 3: Digital User Platform                       |                 |      |
| <b>Phase 1: Total Cost</b>                          |                 |      |
| Task 4: Public Engagement                           |                 |      |
| Task 5: Assessment Report:                          |                 |      |
| <b>Phase 2: Total Cost</b>                          |                 |      |
| Task 6: Scenario Planning                           |                 |      |
| Task 7: General Plan Draft                          |                 |      |
| Task 8: Implementation Plan                         |                 |      |
| Task 9: General Plan Adoption                       |                 |      |
|   |                 |      |
| <b>Phase 3: Total Cost</b>                          |                 |      |
| <b>ALL PHASES TOTAL COST</b>                        |                 |      |
| <b>Additional Tasks (list any additional tasks)</b> |                 |      |
|   |                 |      |

All amounts provided must include all labor, materials, equipment, transportation configuration, installation, training and profit to provide the goods and/or services described in Section IV.A, (as amended by any current RFP amendments for the period specified).

**APPENDIXD**  
**LETTER OF TRANSMITTAL FORM**

# APPENDIXD

## Letter of Transmittal Form

**ITEMS #1 to #4 EACH MUST BE COMPLETED IN FULL (pursuant to Section II.C.29). DO NOT LEAVE ANY ITEM BLANK!** (N/A, None, Does not apply, etc. are acceptable responses.)

**RFP#: 24/20/P**

1. Identify the following information for the submitting organization:

|                 |  |
|-----------------|--|
| Offeror Name    |  |
| Mailin2 Address |  |
| Telephone       |  |
| FED ID#         |  |
| NMCRS#          |  |

2. 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<br>Contractually Oblie-ate | B<br>Neeotiate* | C<br>Clarit\'/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.

3. 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)

4. 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)

**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 in item #], above, I accept the Conditions Governing the Procurement, as required in Section II.C.1. of this RFP;
- I concur that submission of our proposal constitutes acceptance of the Evaluation Factors contained in Section V of this RFP; and
- I acknowledge receipt of any and all amendments to this RFP, if any.

\_\_\_\_\_, 20\_\_  
Authorized Signature and Date (Must be signed by the individual identified in item #2.A, above.)

**APPENDIX E**  
**NON-COLLUSION AFFIDAVIT**

# NON-COLLUSION AFFIDAVIT

*Co111pk1t, Sign ,utd Re1w.11with yout prnpo.fal.*

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 \_\_\_\_\_

**APPENDIX**  
**CONFLICT OF INTEREST**

# CONFLICT OF INTEREST STATEMENT FOR CONSULTING FIRMS

*Complete.. rig., @d retm-11 with yourpropm:ul.*

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 Principal Planning Consultant 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 Planning Consultant and known key personnel needs to describe the conflict.

The Planning Consultant agrees that, if after award, an organizational conflict of interest is discovered, the Planning Consultant makes an immediate and full written disclosure to the City that includes a description of the action that the Planning Consultant 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 Planning Consultant 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 f/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 General Plan Update. For the duration of this firm's involvement in the General Plan Update contract, this firm agrees not to accept any gift, benefit, 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 General Plan Update contract.

I certify that this firm will keep all General Plan Update 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 General Plan Update contract. I understand that if this firm leaves this General Plan Update 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 General Plan Update 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 General Plan Update 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.

**APPENDIX G**  
**DRAFT CONTRACT**

The Agreement included in this Appendix G represents the contract the City intends to use to make an award. The City of Santa Fe reserves the right to modify the Agreement prior to, or during, the award process, as necessary.

## CITY OF SANTA FE

### PROFESSIONAL SERVICES AGREEMENT General Plan Update

This Contract is made and entered into by and between the City of Santa Fe, New Mexico, hereinafter referred to as the "City," and **NAME OF CONTRACTOR**, 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 Contract is in accordance with the provisions of the New Mexico Procurement Code (NMSA 1978, 13-1-28 et seq.) pursuant to NMSA 1978, § 13-1-95.2.E; and NMSA 1978, § 13-1-111.

**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 Contract; and

**WHEREAS**, the Contractor does hereby accept its designation as [professional service], rendering services related to [insert services] for the City, as set forth in this Contract; and

**WHEREAS**, it is agreed by the parties that the performance of the professional services is for a period of [insert term], as directed by the City.

**NOW, THEREFORE**, the parties hereby agree as follows:

**1. Scope of Work.**

The Contractor shall provide the following services for the City:

The General Plan Update is intended to capture the desired vision and choices related to Santa Fe's future that will identify opportunities for beneficial use of the community's resources and guide the advancement of the community. This will be accomplished through the implementation of dynamic growth guidance strategies and actionable implementation steps in the interest of ensuring a vibrant sense of place and belonging. These will reflect and promote overarching community values, trends and themes, and correlate concepts such as sustainability, preservation of and access to resources, community and cultural engagement, connectivity, affordability, economic opportunity and prosperity, equity, inclusion, and regional partnerships.

See Exhibit A for the full Scope of Work.

2. **Standard of Performance: Licenses.**

A 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.

Z. **Compensation.**

A. The City shall pay to the Contractor in full payment for services satisfactorily performed at the rate of \_\_\_\_\_ dollars (\$\_\_\_\_\_ per hour (OR BASED UPON DELIVERABLES, MILESTONES, BUDGET, ETC.), such compensation not to exceed (AMOUNT), excluding/including gross receipts tax. The New Mexico gross receipts tax levied on the amounts payable under this Contract totaling (AMOUNT) shall be paid by the City to the Contractor. **The total amount payable to the Contractor under this Contract, including gross receipts tax and expenses, shall not exceed (AMOUNT). This amount is a maximum and not a guarantee that the work assigned to be performed by Contractor under this Contract 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 Contract 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 Contract being amended in writing prior to those services in excess of the total compensation amount being provided.**

B. Payment is subject to availability of funds pursuant to the Appropriations Paragraph set forth below and to any negotiations between the parties from year to year pursuant to Paragraph 1, Scope of Work, and to approval by the City. All invoices MUST BE received by the City no later than thirty (30) days after the termination of the Fiscal Year in which the services were delivered. Invoices received after such date WILL NOT BE PAID.

C. Contractor must submit a detailed statement accounting for all services performed and expenses incurred. If the City finds that the services are not acceptable, within thirty days after the date of receipt of written notice from the Contractor that payment is requested, it shall provide the Contractor a letter of exception explaining the defect or objection to the services, and outlining steps the Contractor may take to provide remedial action. Upon certification by the City that the services have been received and accepted, payment shall be tendered to the Contractor within thirty days after the date of acceptance. If payment is made by mail, the payment shall be deemed tendered on the date it is postmarked. However, the City shall not incur late charges, interest, or penalties for failure to make payment within the time specified herein.

3. **Term.**

THIS CONTRACT SHALL NOT BECOME EFFECTIVE UNTIL APPROVED BY THE CITY. This Contract shall terminate on **DATID** unless terminated pursuant to paragraph 4 (Termination), or paragraph 5 (Appropriations). This Contract will not exceed a total of four (4) years in accordance with NMSA 1978, §§ 13-1-150 through 152.

4. **Termination.**

A. **Termination.** This Contract may be terminated by either of the parties hereto upon written notice delivered to the other party at least thirty (30) days prior to the intended date of termination. Except as otherwise allowed or provided under this Contract, the City's sole liability upon such termination shall be to pay for acceptable work performed prior to the Contractor's receipt of the notice of termination, if the City is the terminating party, or the Contractor's sending of the notice of termination, if the Contractor is the terminating party; 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 Contract. The Contractor shall submit an invoice for such work within thirty (30) days of receiving or sending the notice of termination. Notwithstanding the foregoing, this Contract may be terminated immediately upon written notice to the Contractor if the Contractor becomes unable to perform the services contracted for, as determined by the City or if, during the term of this Contract, the Contractor or any of its officers, employees or agents is indicted for fraud, embezzlement or other crime due to misuse of City funds or due to the Appropriations paragraph herein. **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 CONTRACT.**

B. **Termination Manaeement.** Immediately upon receipt by either the City or the Contractor of notice of termination of this Contract the Contractor shall: 1) not incur any further obligations for salaries, services or any other expenditure of funds under this Contract without written approval of the City; 2) comply with all directives issued by the City in the notice of termination as to the performance of work under this Contract; and 3) take such action as the City shall direct for the protection, preservation, retention or transfer of all property titled to the City and records generated under this Contract Any non-expendable personal property or equipment provided to or purchased by the Contractor with contract funds shall become property of the City upon termination and shall be submitted to the City as soon as practicable.

5. **Appropriations.**

The terms of this Contract are contingent upon sufficient appropriations and authorization being made by the City Council for the performance of this Contract If sufficient appropriations and authorization are not made by the City Council, 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.

**6. 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.

**7. 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.

**8. 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.

**9. 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.

**10. 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.

**11. 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.

**12. 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 I6 NMSA 1978.

C. Contractor's representations and warranties in Paragraphs A and B of this Article 12 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 12 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 12 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. AH terms defined in the Governmental Conduct Act have the same meaning in this section.

**13. Amendment.**

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

B. If the City proposes an amendment to the Agreement to unilaterally reduce funding due to budget or other considerations, the Contractor shall, within thirty (30) days of receipt of the proposed Amendment, have the option to terminate the Agreement, pursuant to the termination provisions as set forth in Article 4 herein, or to agree to the reduced funding.

**14. Entire Contract.**

This Contract, together with any other documents incorporated herein by reference and all related Exhibits and Schedules constitutes the sole and entire Contract of the Parties with respect to the subject matter of this Contract, 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 Contract, and the related Exhibits and Schedules, the statements in the body of this Contract shall control.

**15. Penalties for violation of law.**

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

**16. 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.

**17. 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, sec. 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.

**18. 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.

**19. 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

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

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

**21. 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

**22. 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. In the event that 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.

**23. 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.

**24. 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.

**25. 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.

**26. 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: (insert name, address and email).

To the Contractor: [insert name, address and email].

**27. 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 into a binding contract.

**28. Merger.**

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

**29. Non-Collusion.**

In signing this Contract, 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.

**30. 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 Contract and under law or equity.

**31. Equitable Remedies.**

The Contractor acknowledges that its failure to comply with any provision of this Contract will cause the City irreparable 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 Contract 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.

**32. Default and Force Majeure.**

The City reserves the right to cancel all or any part of any orders placed under this Contract without cost to the City, if the Contractor fails to meet the provisions of this Contract and, except as otherwise provided herein, to hold the Contractor liable for any excess cost occasioned by the City due to the Contractor's default. The Contractor shall not be liable for any excess costs if failure to perform the order arises out of causes beyond the control and without the fault or negligence of the Contractor; such causes include, but are not restricted to, acts of God or the public enemy, acts of the State or Federal Government, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, unusually severe weather and defaults of 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 Contract.

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:

\_\_\_\_\_  
ALAN WEBBER, MAYOR

\_\_\_\_\_  
NAME

DATE:.....

\_\_\_\_\_  
TITLE

DATE:.....

CRS# \_\_\_\_\_

Registration# \_\_\_\_\_

ATTEST:

\_\_\_\_\_  
KRISTINE BUSTOS MIHELIC, CITY CLERK

CITY ATTORNEY'S OFFICE:

\_\_\_\_\_  
SENIOR ASSISTANT CITY ATTORNEY

APPROVED FOR FINANCES:

\_\_\_\_\_  
EMILY OSTER, FINANCE DIRECTOR

\_\_\_\_\_  
Org. Name/Org#.

## **Exhibit A**

### **Scope of Work**

The Consultant Services may include, but are not limited to, administrative coordination and support, public engagement, land use planning analysis and recommendations delivered in a variety of formats including reports, maps, digital and paper publications. The Consultant Team may include subcontractors, community organizations and other relevant members needed to perform the required tasks.

Tasks and Phases are meant to provide guidance on structure and schedule of deliverables but may change due to circumstances including but not limited to Land Development Code Rewrite progression, Consultant recommendations or other circumstances.

The Tasks and Phases listed below are intended to include the entire General Plan Update project, however only Phase 1 is currently funded. The subsequent Phases 2 and 3 will be undertaken as funding becomes available in subsequent fiscal years.

#### **A. GOALS**

The revised General Plan is intended to capture the desired vision and choices related to Santa Fe's future with a 20-year plan that will identify opportunities for beneficial use of the community's resources and guide the advancement of the community. This will be accomplished through the implementation of dynamic growth guidance strategies and actionable implementation steps in the interest of ensuring a vibrant sense of place and belonging. These will reflect and promote overarching community values, trends and themes, and correlate concepts such as sustainability, preservation of and access to resources, community and cultural engagement, connectivity, affordability, economic opportunity and prosperity, equity, inclusion, and regional partnerships.

The General Plan Update will identify desired and attainable goals, each with a set of quantifiable objectives which are correlated with the implementation plan.

To achieve this vision, the City aspires to the following goals:

- 1) Enhance the City's quality of life by ensuring that development is sustainable, and that social equity, physical growth, redevelopment, and natural resource conservation and protection are balanced, guided and dynamic.
- 2) Foster the Santa Fe tradition which enriches everyday life by designing urban spaces conducive to exceptional community character, public safety, and establishing an ecological conservation basis for urban design, while continuing to honor beneficial existing growth patterns.
- 3) Promote a compact urban form that enables the development of affordable housing, provides a mix of housing types and land uses in all areas of the city.
- 4) Promotes the stabilization of neighborhoods by implementing policies and programs that prevent residential and small business displacement.
- 5) Develop a sector planning process that promotes community cohesion, shared ownership and sense of place.

- 6) Reduce automobile dependence by becoming a city where essential goods, services, employment and amenities are available to residents within their neighborhood. Improve transportation network connectivity and provide equitable access to affordable and multimodal transportation that connects underserved communities to services and employment.
- 7) Diversify the economy while enhancing the city's unique character and sense of place.
- 8) Develop a regional growth management policy framework in collaboration with regional partners.
- 9) Promote engagement with regional partners to ensure coordinated growth and development, and annexation and expansion at the City's periphery.
- 10) Develop a comprehensive and enforceable review process that balances the goals of the General Plan when determining planning and development decisions.
- 11) Develop an implementation plan that creates a consistency of purpose across City departments.
- 12) Promote reconciliation of detrimental inconsistencies, disparities and inequities within the city and among its residents.

## **B. OBJECTIVES**

In order to accomplish these goals, the City intends to engage in the General Plan Update, including an extensive community outreach program, that will identify quantifiable and achievable objectives that help answer the following questions:

- 1) "What's missing and where?" - Identify perceived challenges and shared objectives.
- 2) "Who is it for and how will it help them?" - Identify connections and sources of mutual benefit to the community that promote cohesion and take advantage of opportunities to enhance shared sense of place.
- 3) "What are we trying to deliver and how will it be provided?" - Identify the balance of measures for implementation that best promote, benefit and incentivize livability, equity, health and wellness across the spectrum of the demographic and economic landscape.

## **C. ASSUMPTIONS**

### **City Staff and Consultant Support:**

City staff from the Planning and Land Use Department will actively manage and participate in the revision. The staff will provide all existing data, plans and reports, Geographic Information System (GIS) mapping, and will assist in the reproduction and distribution of materials including mailings, meeting set-up, and other logistical and administrative functions.

City staff will coordinate meeting logistics with any working group, stakeholder group, or committee that may be agreed upon during Task 1. Consultant and City staff will conduct bi-weekly (or as needed) project management meetings (via video conference call) to address project management issues. During especially intense periods, these meetings may take place weekly. Consultant will produce monthly written (PDF format) status reports including a summary of all project activity and corelated invoicing prior to monthly meetings that will be attached to meeting agendas and monthly invoices,

**Statutory Requirements:**

The General Plan Revision will exceed the minimum State of New Mexico Statute requirements outlined in Chapter 3 - Municipalities, Article 19- Planning and Platting and Section 3-19-11 - Legal status of master plan and 3-19-1 - Creation of a Planning Commission and all related "Annotations."

**Scope of Service Tasks:**

It is the intent of the Scope of Service Tasks to provide an essential framework of desired deliverables from the project. The General Plan Update consultant is expected to collaborate with the Land Development Code update project team across all three phases, but particularly in Phase 3, where the code will be amended to reflect the goals and policies identified in the General Plan update project. The full Land Development Code project scope is listed in Section I. G. Procurement Library.

**D. DETAILED SCOPE OF WORK**

**PHASE I**

Approximately 12 months

**Task 1. Administrative Coordination:**

The City is seeking the best approach, process and best practices to develop the update, communication protocol, and an internal meeting schedule in coordination with City staff as outlined below.

- 1) Project Team Kick-Off and Pre-planning Coordination, including:
  - a) Define and come to agreement on plan update development approach, process outline and best practices.
  - b) Establish methods of communication and content sharing.
  - c) Develop agreed upon plan development groups, engagement partners and strategies, committees, stakeholders that will be part of the development of the General Plan.
  - d) Conduct in-person introductions and tours as needed. Work with City staff and leadership to evaluate current long-range planning practices and develop strategies to optimize internal workflows and planning activity outcomes.

**Task 2. Existing Conditions and Trends**

**The City is looking for a baseline of information on existing conditions, including identification of key issues, problems and long-range goals. The City staff will provide all necessary existing materials, data and documentation. The consultant's responsibility will be to analyze this data and document the findings, and to conduct research, outreach, etc. and production of deliverables listed below. All maps will be done within the ArcGIS Software family and will be made compatible with existing City mapping systems.**

The analysis should include but is not limited to mapping, surveys, studies, assessments and analysis of the following;

- 1) **Base Mapping**
- 2) **Regional Trends**
  - a) Population and Growth Trends.
  - b) Demographic trends.
- 3) **Land Capability Analysis**
- 4) **Existing Land Use and Development:**
  - a) Identify developable land, including infill and redevelopment.
- 5) **Neighborhoods:** Develop an official "Neighborhood and Districts" map for the City."
  - a) **Downtown:** Conduct a more granular survey and analysis of downtown Santa Fe.
- 6) **Fiscal Sustainability:**
  - a) Include a "value per acre" analysis or similar analysis.
- 7) **Urban Design**
- 8) **Transportation**
- 9) **Public and Private Utilities**
- 10) **Historical and Cultural Facilities**
- 11) **Public Safety**
- 12) **Schools**
- 13) **Parks and Recreation**
- 14) **Housing**
- 15) **Economic Development Assessment**
- 16) **Environmental Stewardship\Natural Resources**
- 17) **Institutional Structures:**
  - a) Ongoing planning efforts and their sponsor departments/jurisdictions.

**Assessment Report:** The findings of the above items will be summarized in a written (PDF format) Assessment Report. The findings will identify relevant planning issues, a summary of the findings, and policy implications for the General Plan. The report will be reviewed by the appropriate groups/committees as well as the public. It will be published on the project website where the public will be able to make comments and recommendations based on the report's findings.

**Task 3. Digital User Platform (development and refinement to continue through all phases)**

The City seeks a web-based dynamic interface tool that will enable staff, elected officials, the public, developers and stakeholders to access a user-friendly on-line version of the General Plan. The platform will become the Planning and Development Hub for the City after the General Plan is adopted, and therefore must be accessible and updatable by City staff.

- 1) The platform must include all maps, data and studies. The maps, data and studies should take advantage of ESRI Storymaps or similar technology to be interactive and easily understood.
- 2) The platform will integrate other adopted City plans, including the plan texts and map components such as the Residential Pipeline Map, Bicycle Master Plan, the Pedestrian Master Plan, the Water Plan, etc. The General Plan components should be included as map layers so they can be overlaid with components from other plans.
- 3) The platform will include an engagement section that becomes the main hub for digital engagement for the Planning and Land Use Department.

- 4) The platform will be built in such a way that other planning projects such as the Land Development Code website and permit searches can easily be integrated.
- 5) The platform will include a backend, dashboard-style user interface that enables City staff to run reports and manage the General Plan project.
- 6) The platform will be built with translation and accessibility options that meet City engagement standards.

## **PHASE2**

Approximately 6 months (in tandem with LDC update Phase 2)

### **Task 4. Public Engagement Plan**

The coordination and execution of community outreach and engagement cannot be understated as a crucial component to the success of this project. Based on Public Engagement Plans submitted by the Consultant, a special coordination meeting shall occur to be determined in Task 1 for the purpose of refining the General Plan so that each stakeholder consents to it and has a role in its success.

- J) The Public Engagement Plan should include the following elements:
  - a) Inclusive meeting provisions, such as:
    - i) Food and refreshments.
    - ii) Childcare.
    - iii) Interpretation services.
    - iv) Youth-oriented activities and meetings.
    - v) Larger events may have live entertainment to attract a wider audience.
    - vi) Collaboration with community partners such as churches, schools and organizations.
  - b) Plan to recruit equity representatives to drive engagement in their community, attend public meetings, and participate in working groups/committees.
    - i) Representatives should be from an underrepresented community, such as Spanish speaking, indigenous, youth, low-income, etc.
    - ii) The Plan should recommend payment structure for equity representatives.
  - c) Review and consider Culture, History, Art, Reconciliation and Truth (CHART) outcomes.
  - d) Review and consider Midtown outreach outcomes.
- 2) The consultant should provide local engagement and Public Relations (PR) support subcontracted by the offerors.
  - a) The PR team will work directly with City of Santa Fe Communications and Public Engagement teams to develop outreach materials that meet City standards.
  - b) The Public Engagement Plan will be developed using the forthcoming City of Santa Fe Community Engagement Guide to craft all engagement materials. The City Clerk's office is expected to adopt the Engagement Guide in the coming months and will be shared with the project team at that time.
  - c) The PR team will provide all project engagement materials in both English and Spanish and meet City accessibility standards for online and in-person engagement.
  - d) The PR team will partner with local community-based organizations to conduct targeted engagement activities.

### **Task 5. Assessment Report**

Create a report on the engagement findings and identify the City's short-term and long-term needs and desires. The report should include a summary of findings from Task 2, Existing Conditions and Trends, a summary of findings from Task 4, Public Engagement, and a narrative description of the steps that should be taken to address those findings.

### **PHASE3**

Approximately 24 months (in tandem with LDC update phase 3)

#### **Task 6. Growth Scenario Planning**

Utilizing previous tasks' analysis and engagement, the consultant will develop several future growth scenarios for future land use and development patterns. The consultant will use dynamic visualization and analysis techniques to communicate the outcomes of each scenario to the City and the public. These scenarios will be used throughout the planning draft process to demonstrate the outcomes of proposed planning policies.

#### **Task 7. General Plan Draft**

The consultant will prepare the first draft of the General Plan Update. The draft shall include analysis and recommendations for each of the topics listed below. Other than certain required sections, the General Plan may be organized in a manner that best suits the project's overall goals, the vision of the project team and the consultant's workflow as approved by City Staff.

- 1) Executive Summary (required)
- 2) Introduction, Vision & Themes
- 3) Existing Conditions and Trends
  - a) See "Task 2" above.
- 4) Assessment Report (required)
  - a) Report engagement findings and identify of the City's short-term and long-term needs and desires.
- 5) Land Use and Growth Scenarios (see "Task 6" above)
  - a) Develop the Future Land Use Map based on collaboration with Land Development Code Rewrite team and goals and objectives determined in this General Plan Update. Integrate Future Land Use Map into Digital User Platform to demonstrate the connection to other elements of the General Plan.
- 6) Regional Planning
  - a) Priorities, major projects and organizational structures.
- 7) City Character
  - a) Provide updated analysis of existing City Character, emphasizing areas of the City outside of historic overlays (Historic-area character is already well established and documented, only needs to be updated with current conditions.)
  - b) Identify desired urban form for all areas of the City, coinciding with existing neighborhood boundaries, opportunity zones, redevelopment areas, master planned areas, and other contextual information.
- 8) Sector and Special Area Planning
  - a) Identify areas for future Sector and Special Area scale planning.
  - b) Develop strategies for Special Areas places for locals in addition to tourists.

- c) Assess Special Areas. at granular level including economic activity, mobility, urban design and housing.
  - d) Propose "catalyzing" City-led redevelopment projects of city owned property and Right of Way (R.O.W.) to be incorporated into sector plans.
- 9) Mobility and Accessibility
- a) Integrate goals existing plans including Multimodal Transition Plan, Bicycle/Ped/Transit Plans, Sustainability Plan.
  - b) Using recommendations from existing plans, identify quantifiable targets for transportation mode-shift.
    - i) Identify quantifiable targets for infrastructure improvements to achieve mode-shift.
  - c) Develop a "Connectivity and Street Network" map that requires future development to adhere to a street network that creates permeable, publicly accessible new development and improves connectivity in existing neighborhoods.
- 10) Infrastructure and Facilities
- a) Integrate various infrastructure and facility plans to ensure various Capital projects are optimized and not redundant.
  - b) Identify infrastructure needs and desires such as improved internet, areas to extend utilities, etc.
  - c) Using ongoing facilities evaluation, identify top priorities for new facilities and facility improvements.
  - d) Evaluate Green Infrastructure and recommend improvements.
- 11) Climate and Natural Resources
- a) Integrate relevant plans (such as water and sustainability plans) and correlate with goals and objectives of the General Plan.
- 12) Affordability and Human Services
- a) Integrate various Human Service plans such as Senior Services, Youth and Family Services, Recreation Plans.
  - b) Make recommendations for additional affordable housing tools.
  - c) Make "Affordable Living" recommendations that address other aspects of affordability beyond housing.
- 13) Development Review Guidelines
- a) Develop review processes to assess private and public development for compliance with the General Plan.
- 14) Glossary
- 15) Appendices

**Task 8. Implementation and Administration Plan**

Develop an Implementation Plan with the following components:

- a) Provide detailed Implementation Plan that ties each recommendation to achievable goals and objectives.
  - j) Each goal/objective should include proposed cost, departmental responsibility, and timeline.

Administration Plan should include procedures for the following:

- i) Annual progress and action reports.
- ii) C.I.P. Plan update process.
- iii) 5-year reviews.

- iv) 20-year update timeline from planned adoption year.
- v) Identify 40-80+ year elements.

**Task 9. General Plan Adoption and Publication**

The consultants will work in tandem with *City* staff and City leadership throughout the duration of the General Plan adoption process. General Plan adoption related responsibilities include but are not limited to:

- i) Attend and present to commissions, board and the governing body.
- ii) Respond to questions from the public, City staff and leadership regarding all aspects of the General Plan Update.
- iii) Make any amendments necessary that are identified during the adoption process.
- iv) Assist with the transition to the new General Plan as necessary.

After adoption, the consultants will be responsible for the publication of the General Plan, including:

- i) Providing hard copies to the City and stakeholders if desired.
- ii) Publishing the final adopted General Plan to the project website.
- iii) Finalizing any other aspects of the project.

# CITY OF SANTA FE PLANNING & LAND USE DEPARTMENT GENERAL PLAN UPDATE

## *TECHNICAL PROPOSAL*

RFP #24/20/P

Revised April 22, 2024



*The City Different*



Question today  
Imagine tomorrow  
Create for the future

Submitted by:

**wsp**

## APPENDIX D Letter of Transmittal Form

**ITEMS #1 to #4 EACH MUST BE COMPLETED IN FULL (pursuant to Section II.C.29). DO NOT LEAVE ANY ITEM BLANK!** (N/A, None, Does not apply, etc. are acceptable responses.)

**RFP#: 24/20/P**

**1. Identify the following information for the submitting organization:**

|                        |   |
|------------------------|---|
| <b>Offeror Name</b>    | WSPUSAinc.  |
| <b>Mailina Address</b> | 2440 Louisiana Blvd NE, Suite 400, Albuquerque NM 87110 |
| <b>Teleobone</b>       | 505-881-5357  |
| <b>FEDID#</b>          | 11-1531569  |
| <b>NMCRS#</b>          | 01-195458-002   |

**2. 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<br/>Contractually Oblieate</b> | <b>B<br/>Ne2otiate*</b> | <b>C<br/>Clarify/Respond to Queries*</b> |
|------------------|-------------------------------------|-------------------------|--|
| <b>Name</b>      | ManieetRanu                         |                         |  |
| <b>Title</b>     | Senior Vice President               |                         |  |
| <b>Email</b>     | Manjeet.Ranu@wsp.com                |                         |  |
| <b>Telephone</b> | 858-869-7190                        |                         |  |

\* If the individual identified in Colwnn A also perfoJ'IIIll the functions identified in Columns B & C, then no Tcspnse is required for those Columns. If separate individuals perfohn the functions in Columns B and/or C, they must be identified.

**3. 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:  
Leland Consulting Group; Design Workshop  
 (Attach extra sheets, as needed)

**4. Describe any relationship with any entity (such as the City of Santa Fe, State Agency, reseller, etc. that is not a subcontracto.r(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 itetn.)**

N/A  
 (Attach extra sheets, as needed)

**By signing t.he 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 in item #1, above, I accept the Conditions Governing the Procurement, as required in Section 11.C.1. of this RFP;
- I concur that submission of our pro\_posal constitutes acceptance of the Evaluation Factors contained in Section V of this RFP; and
- I acknowledge receipt of any and all amendments to this RFP, if any.

November 28, 20\_2\_3

\_\_\_\_\_  
 Authorized Signature and Date (Must be signed by the individual identified in item #2.A, above.)

November 28, 2023

Ms. Heather L Lamboy, AICP, Assistant Director of Planning and Land Use & Procurement Manager  
c/ o Central Purchasing Division  
City of Santa Fe  
PO Box 909  
Santa Fe, New Mexico 87504-0909

**Re: City of Santa Fe General Plan Update (RFP 24/20/P)**

Dear Ms. Lamboy and Selection Committee:

WSP with our team members, Design Workshop and Leland Consulting Group, are very excited to submit this proposal to support the City's update of the 1999 General Plan. We have been eagerly awaiting this opportunity, as Santa Fe is a special place, home to many cultures that have influenced what it is today.

Our approach to support updating the General Plan includes these five key themes:

- Truly Comprehensive  
Inclusive Engagement  
Impactful Innovations
- Future Ready
- Immediately Implementable

WSP is a multidisciplinary professional services firm that understands the full spectrum of moving from notional ideas about how to organize around and respond to opportunities and issues toward successful, tangible implementation. **WSP knows how to keep plans from sitting on a shelf because WSP delivers projects from** rapidly replacing the West Alameda culvert in Santa Fe, advising on the Santa Fe Midtown plan to delivering multi-billion-dollar infrastructure projects across the globe—our **experience and approach ensures that this will be an actionable General Plan.**

Our team of local, regional, and national experts are pleased to have this opportunity to support the City's present, do right for its future, and both respect and atone for its history.

Sincerely,

**Daniel (Dan) Baer, AICP**  
Principal-in-Charge (PIC)  
National Planning Marketing Lead

**Manjeet Ranu., AICP**  
Project Manager  
National Planning Lead  
Senior Vice President

## CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, §§ 13-1-28, and 13-1-191.1, as amended by Laws of 2007, Chapter 234, 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, § 13-1-181 or a contract that is executed may be ratified or terminated pursuant to NMSA 1978, § 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, §§ 13-1-28 through 13-1-1991 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:**

- Mayor Alan M Webber
- Councilor Signe Lindell, Pro-tern
- Councilor Renee Villarreal
- Councilor Michael Garcia
- Councilor Carol Romero-Wirth
- Councilor lee Garcia
- Councilor Christopher **Rivera**
- Councilor Amanda Chavez
- Councilor Jaime Cassutt

**DISCLOSURE OF CONTRIBUTIONS BY PROSPECTIVE CONTRACTOR:**

Contribution Made By; NIA

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

November 28, 2023  
Date

Principal-in-Charge  
Title (Position)



|          |   |    |
|----------|---|----|
| <b>O</b> | Signed Letter of Transmittal            | 1  |
| <b>O</b> | Signed Campaign Contribution Form       | 3  |
| <b>e</b> | Table of Contents                       | 6  |
| <b>G</b> | Proposal Summary                        | 7  |
| <b>O</b> | Response to Contract Terms & Conditions | 8  |
| <b>O</b> | Offerer's Additional Terms & Conditions | 9  |
| <b>e</b> | Response to Specifications              | 10 |
|          | 1. Organizational Experience            | 10 |
|          | 2. Oral Presentation                    | 50 |
|          | 3. Mandatory Specification              | 51 |
|          | 4. Desirable Specification              | 79 |
|          | 5. Local Preference                     | 80 |
| <b>O</b> | Other Supporting Material               | 82 |

\* Our Non-Collusion Affidavit and Conflict of Interest forms can be found in the Other Supporting Material section

## *Addressing Challenges with Innovative Design & Delivery*

## D. PROPOSAL SUMMARY

### BE GUIDED

Our approach to updating the General Plan:

- **Truly comprehensive.** A living and relevant document that is calibrated periodically.
- **Inclusive engagement.** Broad and targeted, traditional and modern approaches.
- **Impactful innovations.** A culturally and technologically smart City.
- **Future ready.** Environmentally, economically, and socially resilient.
- **Immediately implementable.** Designed to be achievable and accountable.

### BE FOCUSED

Keeping the General Plan Update on track.

- Process focused project management
- Identify key themes to develop an actionable plan
- Use milestones as stage gates to drive project progress

### BE COORDINATED

Staying coordinated with current, major City initiatives, including:

- Land development code update
- Regional partner governance
- Midtown implementation

### BE ENGAGED

Public, stakeholder, and partner engagement to add inclusive value and build consensus.

- Public engagement plan
- Online civic engagement tool
- Community partners

### BE READY

Understanding the tools necessary to achieve successful implementation.

- Position for funding opportunities
- Understand trends
- Develop organizational capacity

**We are local.** Our Santa Fe office is located on 150 Washington Ave. Suite 201, Santa Fe, NM 87501 less than two blocks away from the Santa Fe Plaza.

**We live here.** Members of our WSP team live and work in Santa Fe and we take pride in our community.

**We work here.** We have completed numerous projects in and around Santa Fe including Acequia Trail Pedestrian and Bicycle Underpass for City of Santa Fe and the NM 14 Cerrillos Road Study for the NMDOT.

### Our Experienced Team

Our proposed team, led by project manager, Manjeet Ranu, has experience and expertise in the General Plan tasks outlined in the RFP including, but not limited to:

- Administrative Coordination
- Existing Conditions
- Base Mapping
- Regional Trends
- Land Capability Analysis
- / Existing Land Use and Development
- Neighborhoods
- Fiscal Sustainability
- Urban Design
- Transportation
- Public & Private Utilities
- Historical & Cultural Facilities
- Public Safety
- Schools
- Parks & Recreation
- Housing Economic Development Assessment
- Environmental Stewardship/ Natural Resources
- / Institutional Structures
- Digital User Platform
- Public Engagement Plan
- Assessment Reports
- Growth Scenario Planning
- General Plan Drafting
- Implementation & Administration Plan
- Plan Adoption & Publication
- Equity & Inclusion
- Smart Cities
- Municipal Infrastructure
- Water



## E. RESPONSE TO CONTRACT TERMS & CONDITIONS

WSP USA Inc. has reviewed the sample contract provided with the RFQ and would like to submit the following changes for consideration set forth in Section II.C.15.

### WSP LEGAL EXCEPTIONS

#### ARTICLE/ PARAGRAPH OR EXHIBIT REFERENCE

#### PROPOSED CHANGES/ALTERNATE LANGUAGE FOR CONSIDERATION

9. **Release**

Page 60

**Proposed Change:** Add, "payment" to this Article as shown for clarification.

#### **9. Release**

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

**22. Indemnification**

Page 63

**Proposed Change:** Delete, "defend" in this Article as shown for clarification.

#### **22. Indemnification**

The Contractor shall **d-cfmd**, 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 actor 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. In the event that 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.



## F. OFFEROR'S ADDITIONAL TERMS & CONDITIONS

WSP USA Inc. requests no additional contract terms and conditions.




## G. RESPONSE TO SPECIFICATIONS

### 1. ORGANIZATIONAL EXPERIENCE


Our team has the combined General Plan project experience and qualifications to deliver the desired vision and choices for Santa Fe's future.

We have provided some relevant projects and showcased our qualified team on the following pages.

**WSP AT A GLANCE**





**15,500+**  
Employees



**300+**  
Offices

**Team with the Expertise to Deliver Collaborative & Experienced Team Local Santa Fe Presence**



WSP is a multidisciplinary strategy, planning, design, delivery and management consultancy that develops creative, comprehensive and sustainable solutions for a future in which society and our planet can thrive. Equipped with an intimate understanding of local intricacies, world-class talent and proactive leadership, we enable long-lasting and impactful solutions to uniquely complex opportunities and problems. WSP has offices throughout the United States and globally, including major collaborations throughout the southwest. Lead WSP staff serving Santa Fe all have substantial experience practicing in the southwest undertaking similar multidimensional work. WSP regularly undertakes similarly complex efforts with outstanding, unifying outcomes.

WSP understands the importance of the planning process, which supports navigating toward successful outcomes, with the technical and engagement work embedded in the process to inform decision-making. Investing in these processes properly and being willing to re-evaluate initial assumptions provides much better predictability for projects, stabilizing the subsequent design and delivery phases. With WSP, we bring the deep local knowledge closest to the client backed by expertise from across the company to identify potential risks early and creative solutions that allow the planning process to culminate in a decision of what should be delivered and how.

## KEY TEAMING PARTNERS

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### LELANDCONSULTING GROUP

In more than 250 communities across the country, Leland Consulting Group's (LCG) strategies have resulted in built projects that immediately improve residents' quality of life: thriving downtowns, bustling shopping districts, inviting neighborhoods, and productive employment centers. **As urban strategists, LCG's role is to keep the big picture in sight, while simultaneously providing deep expertise in the strategic, market, financial, and economic elements that make projects possible and successful.** LCG recognizes that special and economically viable places result not just from one factor, but from the combination of quality design, supportive markets, developer capacity, and financial strength. During every assignment, LCG engages the public and private champions essential to rallying support and overcoming obstacles. LCG was established in 1989 and has over 34 years of experience providing real estate and urban planning services to public and private sector clients across the United States.

### DESIGNWORKS-IOP

**As an international design studio, Design Workshop learned the value of building community across cultures, geographies, and economies.** Whether designing a restorative private garden, reimagining an underperforming downtown center or developing the vision for a contemporary park within a fragile ecosystem, they are committed to more than design in the conventional sense.

Design Workshop tackles challenges beyond the project site and its mapped boundaries to create places of timeless beauty and meaningful connections. Their work provides an armature for building communities by considering how people live, economies operate and environments function at a regional scale. Optimizing these systems requires large-scale thinking. Using open space as the primary organizational component, Design Workshop examines economic and transportation networks to restore urban centers, conserve the natural environment and provide equitable access to parks and open space.

## PROJECTS

### KANSAS CITY SPIRIT PLAYBOOK COMPREHENSIVE PLAN

*CITY OF KANSAS CITY | KANSAS CITY, MO*

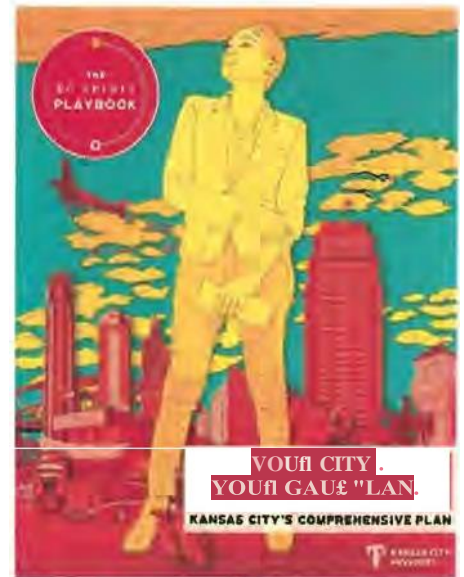
Similar to the Santa Fe General Plan Update, the Kansas City Spirit Playbook was the first update to the Comprehensive Plan for a mid-size city since the 1990s. WSP focused on recommendations for key issues relevant to Santa Fe such as public transportation, affordable housing, jobs access, and multi-modal mobility, much like we did for Kansas City. Incorporating objectives, action steps, and performance measures in an interactive web-based format ensures the Kansas City Spirit Playbook is immediately implementable and that the plan can be used as a tool in daily decision-making at City Hall.

**This plan represents a departure from traditional comprehensive planning and will be organized not by siloed topic areas, but instead by broad inter-connected strategy areas dubbed visibility, mobility, livability, and serviceability.**

WSP is leading the development of the mobility, livability, and serviceability elements of the plan. The plan's objectives include recommendations on 28 issues, like public transportation, jobs access, freight and goods movement, multimodal mobility, vision zero, infrastructure, sustainability, jobs access, parks and open space, public health, affordable housing, business development, and other topics. Each of the objectives include analysis and narrative describing the purpose of the objective, detailed action steps, and performance measures to track implementation of the plan.

**The WSP team coordinated public and stakeholder involvement, conducting strategy sessions that cover a wide range of topic areas of interest to neighborhood and community leaders.**

These conversations have been informed by the technical, data-driven analysis of the WSP team as well as a review of plans and policies in Kansas City's peer cities. Deep stakeholder engagement took place primarily over Zoom, taking advantage of breakout discussion groups and live polling features to get informed feedback. The WSP team worked with the City to draft final plan objectives and recommendations, which were organized by strategy area, plan goal area, and traditional topics (e.g. transportation, housing, land use, etc.). These objectives will live online in an interactive web-based format to ensure that the plan can be used as a tool in daily decision-making at City Hall and for coordinating with other stakeholders. The plan recommendations will also be organized into a structured database, with references to applicable geographies, key performance indicators, and other relevant city plans and policies.



## KAY BAILEY HUTCHISON CONVENTION CENTER DALLAS (KBHCCD) MASTER PLAN

*CITY OF DALLAS / DALLAS, TX*

Like ongoing initiatives in Santa Fe, such as Midtown Campus redevelopment, the KBHCCD Master Plan provides a comprehensive vision for an important city district, making this much broader and inclusive than a convention center. This Master Plan focuses elements relevant to Santa Fe such as leveraging transit access for future development, multimodal transportation enhancement, and the creation of a walkable and dynamic multi-use public space.

The KBHCCD Master Plan provides a comprehensive vision for the future of the convention center and surrounding district. **The Master Plan lays out a strategy to transform the facility into one of the nation's premier Convention Centers that is both compelling and competitive in the market** in terms of the amount and quality of available space (exhibit, ballroom, and meeting rooms), on-site amenities, a leader in design and surrounded by a walkable, transit accessible district. The master plan considers the many investments required to achieve the plan's goals in a holistic and integrated plan.

Four critical elements of the master plan that support the transformation of the convention center are:

- **Area Plan** Leverages improved transit access to create a dynamic 30 plus acre mixed-use district around the convention center, extending the vitality and excitement from inside the convention center to the surrounding area.
- **Multimodal Station Plan** Brings together transit routes in the area to increase accessibility for the new, expanded Convention Center and serve the substantial new development in the Convention Center District.
- **Transportation Plan** Proposes enhancements to the multimodal transportation and street networks to improve access to the Convention Center and surrounding district, and to better connect the region.
- **Funding and Financing Plan** Identifies plan for implementation, funding, and financing identifies strategies that capture the value created by these investments to pay for the new Convention Center without financially impacting Dallas residents.

### ADVANCED PLANNING



## BURNHAM YARD

### STATE OF COLORADO P3 UNIT/ DENVER, CO

**Burnham Yard is a key historic asset located in a strategic location in Denver, similar to the varied historic and cultural assets located throughout Santa Fe.** As owner's representative and master planner, WSP helped foster the Burnham Yard plan, which focuses on creating value to stitch together neighborhoods, achieve beneficial mobility improvements, and redevelopment while promoting responsible preservation of historic assets. All these key objectives are relevant to future development considerations in Santa Fe.



Burnham Yard was an important railyard and employment center for the Denver region. with its establishment prior to Colorado statehood. Because of its role in the development of the region and its age, potentially significant historic resources exist. In 2016, Union Pacific Railroad ended railyard operations on the property, opening the opportunity for the State to acquire the site. Since its decommissioning, it has sat underutilized despite its strategic location in central Denver.

While its location is strategic, there are many obstacles to overcome at the site. Given the history and use as a rail yard, there are significant costs for transportation and infrastructure improvements, complex environmental remediation, and costs to advance the laudable social initiatives mandated of the P3 Unit. The redevelopment plan will help guide the potential value opportunities that can be created from the site based on informed market and social equity findings to achieve beneficial mobility improvements and redevelopment. The site is long, yet narrow and constrained by freight and transit rail lines. An existing RTD light rail station presents an opportunity for equitable transit-oriented development. Proximity to the Auraria Higher Education Center is another opportunity to explore relative to the campus master plan and advancing key initiatives of the P3 Unit. Stitching together neighborhoods surrounding Burnham Yard would mitigate the decades-long impact of Interstate 25- the Valley Highway- has had and presents an opportunity to link with natural resources and trails in the area including the South Platte River, Cherry Creek, and Lakewood Gulch.

## NEW JERSEY TRANSIT 5-YEAR CAPITAL PLAN

### NEW JERSEY TRANSIT & NEWARK, NJ

Similar to Santa Fe's goal to develop General Plan Update that is immediately implementable and guides decision making, WSP developed the NJ Transit 5-year Capital Plan to guide strategic investments. The Capital Plan reflects a comprehensive vision through an ambitious set of projects and programs that focus on key impacts relevant to Santa Fe such as comprehensive transit investments and the support of economic development and equity.



Currently, WSP is supporting NJ Transit in developing and regularly updating its 5-Year Capital Plan to guide critical strategic investments across the agency. Released in June 2020, the Capital Plan presents an unconstrained vision and ambitious set of projects and programs to provide a vastly improved experience for customers and leverage transit to build healthy, inclusive, and sustainable communities. The projects and programs included in the Capital Plan are estimated at \$5.78 billion over the next five years. Major areas of work included providing strategic support to identify comprehensive transit investments; determining how those investments could support economic development and equity; evaluating socioeconomic, planning, environmental, and operational impacts; and advising on project prioritization methods. In partnership with WSP, the content of the Capital Plan will be renewed and reprioritized regularly to reflect the emerging needs of the state and NJ Transit's customers.

## RESILIENT NJ REGIONAL RESILIENCE ADAPTATION ACTION PLAN

### NJ DEPARTMENT OF ENVIRONMENTAL PROTECTION/ ATLANTIC CITY REGION, NJ

WSP is currently leading a consultant team in the development of a Regional Resilience and Adaptation Action Plan for the Atlantic County Coastal Region under the NJ Department of Environmental Protection (NJ DEP) Resilient NJ program. The U.S. Department of Housing and Urban Development (HUD)-funded regional planning project is one of four pilot regions in the Resilient NJ program, which seeks to set the precedent for how to reduce flood damages and increase physical and social resilience to climate impacts through community-based resiliency planning. **This is an example where WSP and consulting partners are tapping into a broad range of expertise to address multi-dimensional resilience challenges at the regional scale.** Developing innovative solutions over a long-term horizon is a key focus for the project and the Atlantic County Coastal Region won the Resilient NJ Innovation Competition for incorporating innovative ideas and practices into the proposed solutions to address climate vulnerabilities.



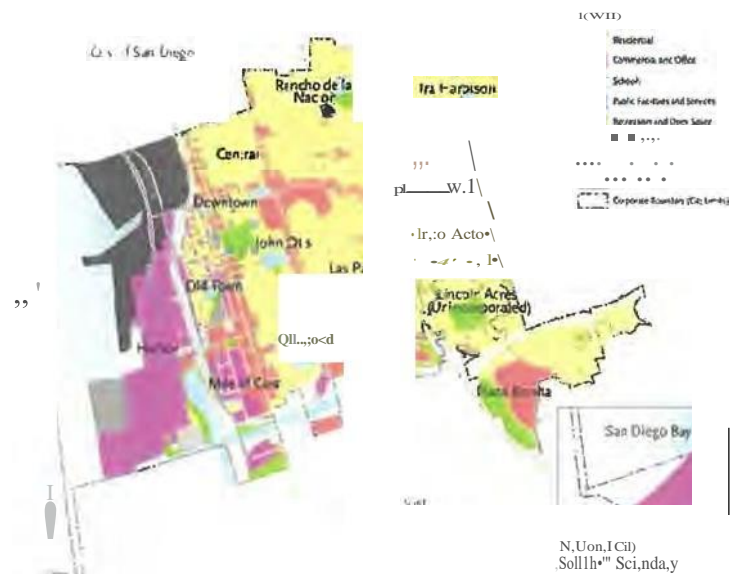
## NATIONAL CITY MUNICIPAL CODE, ZONING CODE, AND SPECIFIC PLAN UPDATES

*CITY OF NATIONAL CITY/ NATIONAL CITY, CA*

Demonstrating WSP's deep understanding of the link between updating a General Plan in coordination with a land use code, another WSP work effort in National City is more technical, requiring a working dialogue between land use and development regulations, and the General Plan to encourage the development of diverse housing in a community that sorely needs it.

The WSP team is revising the policies, regulations, and development standards in National City's various specific plans and zoning code, such as floor-area ratios (FARs), maximum allowable heights, and parking requirements, to accelerate housing production in all income categories.

Included in this effort are the development of an ADU ordinance, updated density bonus regulations, streamlined development approval procedures, and other incentives to increase housing production. Another key component of this endeavor is the development of Objective Design Standards to streamline the development process for multi-family residential projects. The end result will be a comprehensive suite of regulatory tools and incentives to accelerate housing production in a manner consistent with the goals of National City's Housing Element and recent state legislation.



## COMPREHENSIVE PLAN UPDATE AND DEVELOPMENT CODE REWRITE

LELANDCONSULTINGGROUP

*CITY OF ALBUQUERQUE/ ALBUQUERQUE, NM*

LCG led the economic development component of Albuquerque's comprehensive plan and development code rewrite project.

**This illustrates the importance of a methodological, evidence-based approach to the planning process that will be taken for Santa Fe.**

The project focused on improving both the comprehensive plan and the development code to remove barriers to development and better implement their centers and corridors policies. Developer outreach, market research, and pro forma testing of development concepts were used to ensure that the policies and goals envisioned by the community are in fact feasible and that the development code properly enables them. More specific research was focused on understanding barriers to economic development on the city's west side, where a jobs-housing imbalance has exacerbated regional transportation problems.



## LOS ALAMOS TOURISM STRATEGIC PLAN

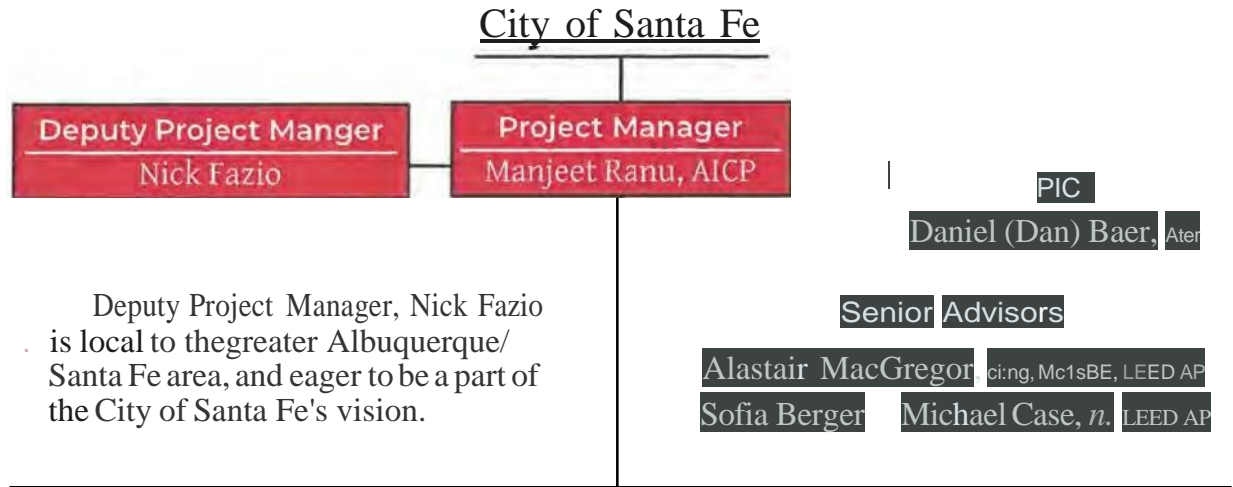
DESIGNWORKSHOP

*LOS ALAMOS COUNTY / LOS ALAMOS, NM*

Los Alamos, New Mexico is rich with history, natural beauty, and scientific discovery, and is the gateway to three National Parks. While tourists have always visited Los Alamos, the County engaged Design Workshop to create the Los Alamos Tourism Strategic Plan to help unify ongoing tourism efforts and position the County to optimize tourism economic development for the benefit of the Los Alamos and White Rock communities.



The final plan provides direction for decisions relating to tourism, community investment, cultural opportunities, and physical development. The County and its partners use the detailed action plan to direct funding and resources. Implementing the recommendations of this plan, along with other County and community initiatives, resulting in an improved visitor experience and enriched quality of life for the local community. **This project gives us firsthand knowledge of regional coordination opportunities to support the Santa Fe General Plan Update.**



Deputy Project Manager, Nick Fazio is local to the greater Albuquerque/Santa Fe area, and eager to be a part of the City of Santa Fe's vision.

Task Leads

**Base Mapping & Digital User Platform**

Allyson Powers  
Patrick Kresl  
Jay Puckett, GISP

**Land Capability & Existing Land Use Development**

David Schumacher  
Chris Geddes - DW  
Jessica Garrow-OW

**Urban Design**

John Loughran, AIA, A1cP, PP, LEED  
Chris Geddes - DW  
Jessica Garrow - DW

**Public Engagement**

Nick Fazio

**Historical & Cultural**

Ted Roberts, M.A., RPA  
Jennifer Hyre

**Environmental Stewardship & Natural Resources**

Joanna Franks

**Regional Trends, Fiscal Sustainability, Housing, & Economical Development**

Chris Zahas, ACIP - LCG  
Ted Kamp - LCG

**Public & Private Utilities, Public Safety, Schools, & Parks & Recreation**

Amy DiCarlantonio, AICP,  
ENV SP, LEED, APBD+C

**Implementation & Capital Programming**

Alfonso Hernandez  
Peter Waldt

**Institutional Structures**

Eryca Dinsdale, PE, PMP  
Robert (Rob) DiAdamo

**Municipal Infrastructure**

Larissa James  
Scott Cogan, PE, CQM

**Equity & Inclusion**

Gabrielle (Gabi) Brazzil  
Sean Scott

**Transportation**

Matthew Long

**Growth Scenario Planning**

Sara Khoeini, Ph.D.

**Subconsultants**

- Leland Consulting Group (LCG)
- Design Workshop (DW)

**Water**

Rebecca Borker, MPA

**Smart Cities**

Jaco Cronje

## RESUMES



## PROJECT MANAGER

**MANJEET RANU**

*PROJECT DIRECTOR & MANAGER,  
SENIOR VICE PRESIDENT - NATIONAL PLANNING LEAD*

27 Years of Experience

**EDUCATION**

MURP, Urban and Regional Planning, University of Colorado-Denver

MPA, Public Administration, University of Colorado-Denver

BA, Biology & Political Science, University of Colorado-Boulder

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

American Institute of Certified Planners

American Planning Association

Urban Land Institute: Full Member

Manjeet understands Santa Fe, having visited more than a dozen times, beginning in childhood and now providing support to the City as the Public Works Owner's Representative for Midtown. He has significant experience managing highly complex, multi-billion dollar planning projects. Interdisciplinary projects--just like the Santa Fe General Plan Update--are the heart of his passion for planning. Manjeet will be the project manager for the WSP and City team, supported by Nick Fazio, a local deputy project manager.

Manjeet Ranu is a comprehensive planning practitioner, having practiced in six high-growth, economically significant states as a land use, transportation, and environmental planner, with urban design expertise. He was an executive for three large urban transportation agencies in the Los Angeles, Salt Lake, and Atlanta regions. He also led community development for cities in the San Diego and Dallas regions. His transit experience involved leading and administering transportation planning, capital programs, Federal Transit Administration Capital Investment Grants program projects, National Environmental Policy Act and the California Environmental Quality Act. Areas of practice in land use include policy planning, master planning, development review, building safety, housing programs, preparing land use regulations, California Environmental Quality Act, and code enforcement. Manjeet's 20 years of experience in the public sector and six years in the private sector across different regions of the United States, along with years of community leadership, has given him keen strategic insights and creativity to advance highly complex initiatives to successful outcomes with broad support and equitable impact.

- Project Manager, Midtown Redevelopment Professional Services, **City of Santa Fe (NM)**
- Chief of Capital Programs, Expansion and Innovation, **Metropolitan Atlanta Rapid Transit Authority (MARTA)**
- Director of Capital Development, **Utah Transit Authority**
- Senior Executive Officer, Long Range Transportation Planning and Mobility, **Los Angeles Metro (CA)**

LOCAL DEPUTY PROJECT MANAGER  
AND PUBLIC ENGAGEMENT PLAN LEAD



**NICK FAZIO**

**DEPUTY PROJECT MANAGER - SENIOR CONSULTANT,  
URBAN PLANNER & PI SPECIALIST**

13 Years of Experience

**EDUCATION**

MUD, Urban Design,  
University of Colorado-Denver  
BAEPD, Environmental  
Planning and Design,  
University of New Mexico

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

American Planning  
Association

**OTHER  
LANGUAGES**

Spanish  
(conversational)

Nick's experience as a multidisciplinary consultant in the fields of public involvement, long-range community planning, transportation planning, and policy research and analysis gives him the background needed to support the City of Santa Fe in creating a General Plan update that is future ready. Starting his career as a tribal planning intern here in New Mexico, he has led municipal long-range planning departments, served as a local Historic and Cultural Resources Preservation Officer, and served as project manager for megaproject health impact assessments. Nick's project management experience has continued to expand, both for sophisticated public involvement and communications programs, as well as inland port plans and transportation projects. His skills as a facilitator, strategic planner, and designer enable him to effectively solve problems and advance complex communication challenges with diverse audiences. Nick has worked in both urban and rural settings across the American West, with both public and private stakeholders, and always strives to create place-based solutions that meet client needs and serve the local community.

- Public Involvement Planner, Cerrillos Road Alignment Study, **NMDOT (Santa Fe, NM)**
- Public Involvement Planner, NM 500 Rio Bravo Bridge Replacement, **NMDOT (Albuquerque, NM)**
- Public Involvement Lead, Inland Port Planning Study, **Albuquerque International Sunport (NM)**
- Public Involvement Specialist, Buildable Lands and Housing Needs Analysis, **Klickitat County (WA)**
- Public Involvement Planner, Rail Safety Study - Port of Columbia County, **Columbia County (OR)**



PRINCIPAL-IN-CHARGE  
 AT-D ADVISORY SUPPORT

## DAN BAER, AICP

*PIC, NATIONAL PLANNING MARKETING LEAD*

41 Years of Experience

### EDUCATION

MUP, Planning, New York University

BA, Public Policy, Pomona College

### CERTIFICATIONS/ LICENSES/ MEMBERSHIPS

Certified Planner: US American Planning Association

Urban Land Institute: Full Member

Dan Baer is experienced in managing large, multidisciplinary teams for transportation and land development initiatives, including environmental impact statements, major investment studies, alternatives analyses, and master plans for major transportation and site development projects. Dan has managed the preparation of hundreds of major transportation projects and environmental assessment programs, including the analysis of zoning, socioeconomic trends, traffic and transit-related issues, air quality, and noise effects for projects across the country. He has led and organized a variety of waterfront development initiatives, including the development of design guidelines and master plans. Dan has also directed various program management efforts across the country which involved the oversight of planning, environmental, and design functions for major transportation and development initiatives.

- Project Manager, Burnham Yard Redevelopment, **City of Denver (CO)**

Project Manager, Hudson Yards-Eastern and Western Rail Yards Master Plan and Design Guidelines, **Hudson Yards Development Corporation (New York, NY)**

- Deputy Project Manager, Master Plan, Design, and Environmental Assessment, **Port Authority Bus Terminal Replacement Program (New York, NY)**
- Project Manager, Multi-Modal Master Plan, **Kay Bailey Hutchinson Convention Center (Dallas, TX)**

## ADVISORY SUPPORT



**ALASTAIR MACCIRECIOR, CEng, MCISBE, LEED AP**  
*SENIOR VICE PRESIDENT, NATIONAL BUSINESS LINF*  
*EXECUTIVE: PROPERTY+ BUILDINGS*

24 Years of Experience

**EDUCATION**

MSc, Building Services Engineering & Management, Heriot-Watt University, Edinburgh, UK

BEng, Mechanical Engineering, Newcastle University, Newcastle, UK

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

CIBSE Chartered Engineer

LEED AP BD+C

FitWel Ambassador

Chartered Institution of Building Services Engineers

United States Green Building Council

With over 25 years in high performance design, Alastair's expertise spans all scales, from individual net zero buildings through to strategy portfolio analysis. His portfolio includes Net Zero Carbon work for global portfolio analysis. His portfolio includes Net Zero Carbon work for global portfolios; NASA's Net Zero, LEED Platinum "Sustainability Base"; Beijing's LEED Platinum World Finance Center; Los Angeles' LEED Platinum Federal Courts; the world's first commercial Spaceport at Spaceport America; eco-city strategies for Jurong Lake eco-city, Tianjin eco-city, Marina Bay and Tanggu; and many of the world's most sustainable sports venues including Golden Center, Intuit Dome, Al Wakraj Stadium, and the Los Angeles 2028 Olympic bid.

Alastair's specialist expertise includes sustainable, low carbon design and program development; LEED certification; value engineering; advanced MEP design; high performance buildings; commissioning; passive design; renewables; energy, decarbonization, and operational resiliency strategy planning; smart building and city strategies; and the development of digital solutions to drive low carbon design and strategic planning.

- Project Management, Facilities Modernization & Renovation Program, **Los Angeles Community College District (CA)**  
High-performance Buildings Team Leader and LEED Sustainability Consultant, Campus Renovation, **Children's Institute (Los Angeles, CA)**
- Mechanical, Electrical, and Plumbing Project Manager and Lead Mechanical Design Engineer, Theatre Expansion, **His Majesty's Theatre (Aberdeen, Scotland)**
- Mechanical, Electrical, and Plumbing Project Manager and Lead Mechanical Design Engineer, New Museum Design, **Shetland Museum & Archive (Lerwick, Scotland)**

ADVISORY SUPPORT



**SOFIA BERGER**  
**SENIOR ADVISOR, NATIONAL  
TRANSPORTATION EXECUTIVE**

20 Years of Experience

**EDUCATION**

MUP, Planning, New York University  
BA, Public Policy, Pomona College

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Women's Transportation Seminar

**OTHER  
LANGUAGES**

Spanish (fluent)

Sophia Berger is a senior vice president serving as a leader in the United States transportation practice, particularly focused on rail and transit and public-private-partnerships. She specializes in strategic planning, project management, and project turnaround. Prior to this role, she was the division manager in Latin American and the Caribbean division for three years. In this role, she was responsible for the strategic direction of the regional operations as well as all client management, project delivery, and business development activities. In her prior role, Sophia managed the development of the company's private sector activities in Africa, where she focused on bringing the company's extensive regional infrastructure experience to new rail, road, port, mining, and energy projects under development by private sector users or funders. She has more than 15 years of infrastructure experience spanning from project management of construction projects in the field to management consulting for governmental transportation agencies around the world.

- Strategic Partner, Penn Station Master Plan, **MTA, Amtrak, and NJTransit (NJ)**
- Strategic Partner, Pilot Consultancy #2, Digital and Systems Architecture, Jacksonville **Transportation Authority (FL)**
- Senior Engineer, Interstate 75 Design-Build-Finance-Maintain Segment 3 Project, **Oakland Corridor Partners (CA)**
- Strategic Partner, Resort Corridor Feasibility Study, **Regional Transportation Commission of Southern Nevada (NV)**

## ADVISORY SUPPORT

**MICHAEL CASE, PE, LEED AP**

**SENIOR ADVISOR, ENERGY NATIONAL BUSINESS  
LINE EXECUTIVE**

20 Years of Experience

**EDUCATION**

BS, Electrical  
Engineering, Michigan  
State University

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

LEED AP: UN, 2023

Professional Engineer:  
FL, 2012 (74849); FL,  
2023; NY, 2023; NY,  
2010 (087729)

Institute Of Electrical  
& Electronic Engineers

Michael Case is the central plant and district energy lead within the U.S. energy national business line. He has more than 19 years of experience overseeing operations for the electrical and mechanical group within the U.S. energy division, including power and thermal generation, distributed generation, and energy management services for a wide range of facilities such as hospitals, university campuses, utilities, manufacturing centers, commercial and public buildings, and airports. Michael has worked on project management, scoping, planning, design, and construction management for energy infrastructure projects. He has supervised multi-million dollar contracts and delivered projects across various engineering disciplines.

- Design Lead, LaGuardia Airport Redevelopment, **LaGuardia Gateway Partners (Queens, NY)**
- PIC, New York City School MEP Services, **New York City School Construction Authority (New York, NY)**
- Electrical Engineer, Empire State Plaza Chiller Steam Turbine Replacement/Steam Compressor, New York State Office of General Services (**Albany, NY**)
- Lead Electrical Engineer, Mount Sinai Medical Center Boiler Assessment Project, **Mount Sinai Medical Center (Statewide, NY)**



BASE MAPPING

Ar.,JD **DIGITAL USER PLATFORM LEAD**

## ALLYSON POWERS

*ASSISTANT VICE PRESIDENT, APPLICATION DEVELOPER*

31 Years of Experience

### EDUCATION

BA, University of Colorado

### AWARDS

W3 Wehby Award-TIMED to Learn. 2008

PB Infrastructure Company Quality Team - Third Place, PB CommentSense, 2005

Parsons Brinckerhoff Project of the Year - Lower Manhattan Communications Plan, Parsons Brinckerhoff, 2002

Allyson Powers, a project manager for the WSP Project Visualization Technical Resource Center and a senior computer graphics specialist, is responsible for the production of interactive media and management/implementation of custom websites. She also has expertise in consulting on the implementation of CommentSense public comment management systems, including consultation and training. Allyson's responsibilities include overseeing production design and development, needs analysis, budget development, implementation, training, deployment, quality control, programming customization, and client satisfaction. She has applied her skills to a variety of projects, including transportation, land use, urban planning, environmental management, lobbying, and education.

Allyson is knowledgeable with the Americans with Disabilities Act (ADA) guidelines and Section 508 for both state and federal programs and implements those guidelines on all projects requiring ADA compliance as it applies to online print documents and website development. She is experienced in using today's most advanced Web tools and techniques and has a unique ability to mesh both design and simple functionality into all projects.

- Task Lead, North Carolina 2050 Statewide Transportation Plan-Interactive Tool Development, **NCDOT (Statewide, NC)**
- Web Project Manager, Lake Sumter Metropolitan Planning Organization 2019 On-Call, **Lake County (FL)**
- Web Project Manager, City of Seattle Central Waterfront Engineering Project, **Waterfront Seattle (WA)**
- Web Project Manager, Northeast Corridor Passenger Rail Corridor Investment Plan, **New York Metropolitan, (New York, NY)**



BASE IV1APPII/JG  
AN) DIGITAL USER PLI-ATFORVI SLJPPORT

## PATRICK KRESL

*SENIOR GRAPHIC DESIGNER, VIDEO & USER  
EXPERIENCE DESIGNER*

28 Years of Experience

### EDUCATION

2B2BBFA, Graphic Design, Colorado State University

3B3BBA, Speech Communications, Colorado State University

Patrick is a senior graphic designer and user interface/user experience web designer with WSP. He has designed, art directed and produced a broad spectrum of web, video, print, interactive projects, and web-based guides within the WSP's Project Visualization team by engaging the creative process to implement innovative and impactful communication. The websites he developed have implemented advanced web technologies, such as database-driven content, web-based applications that allow clients to update sites themselves, interactive maps, client-administered surveys for public feedback, and responsive design to provide an optimal user experience across a wide range of online tools and smart devices.

- Creative Director, Zero Emission Bus (ZEB) Program Introduction and All-Staff Training, **Maryland Transit Administration (MD)**
- Creative Director, Microsoft Environmental Sustainability Resources Training, **Microsoft (Global)**
- Lead Designer and Course Developer, Regional Employee Waste and Recycling Training - Online Interactive Training Course, **Washington Metropolitan Area Transit Authority (WMATA), Washington D.C.**
- Design Lead, Federal Highway Administration (FHWA) Planning and Environment Linkages - Interactive Guide, **FHWA**

BASE MAPS  
AND DIGITAL USER PLATFORM SUPPORT



**JAY PUCKETT, GISP**

*ASSOCIATE VICE PRESIDENT, GEOSPATIAL TECHNOLOGY*

16 Years of Experience

**EDUCATION**

MPA, Public Administration, Syracuse University, Syracuse, NY

MA, Geography, Syracuse University, Syracuse, NY

BA, Geography, University of North Carolina, Chapel Hill, NC

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Geographic Information Systems Professional Certification

Jay Puckett is the manager of WSP's Geospatial Analysis and Visualization practice. He specializes in applying Geographic Information Systems (GIS) and geospatial technology to a variety of project types and markets across the company's portfolio. He has recent experience supporting electric transmission siting studies, infrastructure planning efforts, web application development, and information management efforts for major infrastructure development projects. Jay has experience with GIS, public involvement, web mapping development, Global Positioning Systems (GPS) data collection, IT instruction and training, and SharePoint development. Jay also has advanced training in organizational leadership and management.

- GIS Lead, Northern New York Priority Transmission Project, **New York Power Authority (NY)**
  - GIS Lead and Siting Specialist, SMART Path Transmission Project, **New York Power Authority (NY)**
- GIS Technical Advisor, Baltimore County Sewer Consent Decree Program Management, **Baltimore County (MD)**

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REGIONAL TRENDS,  
FISCAL SUSTAINABILITY, HOUSING,  
AND ECONOMIC DEVELOPMENT ASSESSMENT LEAD

## CHRIS ZAHAS, AICP

*LELAND CONSULTING GROUP MANAGING PRINCIPAL*

25 Years of Experience

### EDUCATION

MA of Urban and  
Regional Planning,  
Portland State  
University

BA, International  
Affairs, Lewis and  
Clark College

### CERTIFICATIONS/ LICENSES/ MEMBERSHIPS

AICP #019464

Chris Zahas is a real estate strategist and project manager with an emphasis on urban corridors, downtown revitalization, employment districts, transit-oriented development, and public-private partnerships. His project approach is to assist public and private sector clients in turning broad visions into prioritized and achievable action plans by combining market and economic research with strategic advice that is tied to the fundamental principles of real estate development. In all cases, Chris keeps the focus of projects on implementation, always anticipating next steps and never hesitating to advise a client to change directions when that is the best course.

In over 22 years at Leland Consulting Group, he has managed more than 35 downtown and corridor implementation strategies and played a strategic advisor role in dozens more. In the economic development realm, he brings a deep understanding of economic and demographic trends, ensuring that long-term strategies reflect the evolving drivers of how businesses choose to locate and where people choose to live. Prior to joining Leland Consulting Group, Chris coordinated economic development projects for the Portland Development Commission, Portland's redevelopment agency.

- Real Estate and Economic Development Advisor, Comprehensive Plan Update and Development Code Rewrite, Albuquerque, NM, **City of Albuquerque & Bernalillo County (NM)**
- Lead Market and Real Estate Advisor, Health District Master Plan, Coeur d'Alene, ID, **City of Coeur d'Alene (ID)**
- Senior Economic Advisor, Comprehensive Plan Update, Meridian, ID, **City of Meridian (ID)**

LELANDCONSULTINGGROUP



REGIONAL TRENDS,  
FISCAL SUSTAINABILITY, HOUSING,  
AND ECONOMIC DEVELOPMENT ASSESSMENT SUPPORT

## TED KAMP

LELAND CONSULTING GROUP SENIOR ASSOCIATE

22 Years of Experience

### EDUCATION

MA of Urban and Regional Planning, PhD coursework, University of Colorado  
MS, Marketing (Consumer Behavior), University of Arizona  
BA in Business Administration (with honors), University of Oklahoma

Ted Kamp provides market analysis in support of strategic land use decisions for public planners and private developers. Drawing on expertise in GIS, market economics, and demographic analysis, he incorporates user-friendly information designed to convey critical market intelligence to stakeholders. His work spans a variety of development and planning contexts including urban infill, economic development, suburban revitalization, impact analysis, and transit-oriented development. Recent client work has covered locales across the western and central US. In addition, he taught the Urban Market Analysis course for planning graduate students at the University of Colorado-Denver for five years. After receiving a BBA (with honors) from the University of Oklahoma and an MS in Marketing/Consumer Behavior from the University of Arizona, Ted provided research and strategic planning services for the Leo Burnett advertising agency in Chicago. He subsequently earned a Masters in Urban and Regional Planning (and completed PhD coursework) at the University of Colorado-Denver.

- Market Analyst, Demographic and Employment Dynamics, Comprehensive Plan Update and Development Code Rewrite, Albuquerque, NM, **City of Albuquerque & Bernalillo County (NM)**
- Demographic and Land Use Analysis, Small Area Forecasting, Comprehensive Plan Update, Auburn, WA, **City of Auburn (WA)**
- Lead Market Analyst, International Air Center Economic Feasibility Study, Roswell, NM, **City of Roswell (NM)**



LAND CAPABILITY  
AND EXISTING LAND USE DEVELOPMENT LEAD



## DAVID SCHUMACHER

### DIGITAL SOLUTION ARCHITECT

8 Years of Experience

#### EDUCATION

BA, Colby College,  
International Studies

MA, Planning,  
University of Southern  
California

#### CERTIFICATIONS/ LICENSES/ MEMBERSHIPS

American Institute  
of Certified Planners  
(AICP) #305064

David Schumacher is a lead planner with WSP USA having more than eight years of experience. He is adept at providing planning services for multimillion-dollar initiatives, preparing feasibility studies, and alternatives analyses, and coordinating projects through the environmental review phase, with a focus on corridor studies.

- Lead Planner, Burbank Airport Station Area Plan, **City of Burbank, (CA)**
- Lead Planner, Los Angeles County Rail Network Integration Study, **LA Metro (CA)**
- Lead Planner, Westside Mobility Study and Measure M Multi-Year Subregional Program, **Southern California Association of Governments (SCAG)**
- Planner, Bristol Street Transit Corridor Study, **Orange County Transportation Authority (CA)**

## URBAN DESIGN LEAD



**JOHN LOUGHRAN, AJA, AICP, PP, LEED**  
*SENIOR VICE PRESIDENT, LAND/URBAN PLANNER*  
**NATIONAL URBAN DESIGN**

30 Years of Experience

**EDUCATION**

MBA, Baruch College  
 MS, Architecture,  
 Catholic University of  
 America

**CERTIFICATIONS/  
 LICENSES/  
 MEMBERSHIPS**

Registered Architect:  
 Washington DC, NJ, NY  
 AICP  
 LEED Accredited  
 American Institute of  
 Architects  
 American Institute of  
 Certified Planners  
 Urban Land Institute  
 Mpact (formerly  
 Rail~volution),  
 National Steering  
 Committee

John leads WSP's Urban Design and Placemaking Practice. He brings an expertise in urban development and master planning honed from his experience as an architect, urban designer and through his work for both public agencies and private developers. John utilizes an integrated approach to leverage transportation and other infrastructure investments to catalyze development to meet agency, developer, and community goals.

John understands the complexities of integrating mixed-use development with transportation while meeting community needs and market demands. John brings lessons learned from delivering equitable and sustainable projects across the US, with an approach that delivers a vision unique to each locality. His experience includes transformative projects such as developer's guidelines for the overbuild above Manhattan's Hudson Yard, a comprehensive master plan for the Dallas Convention Center and district that includes recommendations for transportation investments and a new TOD entertainment district, and Guidelines for Equitable Transit Oriented Development for the City of Raleigh.

- Urban Design Lead, Guidelines for Equitable Development Around Transit - Raleigh, NC, **North Carolina Department of Transportation (NCDOT)**

Project Manager and Area Plan Task Lead, Kay Bailey Hutchinson Convention Center Dallas (KBHCCD) Master Plan and Transit Oriented Development Area Plan, **City of Dallas (TX)**

- 11 Land Use Planning Lead, Feasibility Study for Land Use Master Plan at Sakonnet River Bridge Landings, Portsmouth and Tiverton, RI, **Rhode Island Turnpike and Bridge Authority (RI)**

Project Manager, Capital Gateway Concept Plan - Hartford, CT, **City of Hartford (CT)**

## DESIGNWORKSHOP



LAND CAPABILITY,  
EXISTING LAND USE DEVELOPMENT,  
AND URBAN DESIGN SUPPORT

**CHRIS GEDDES***DESIGN WORKSHOP PRINCIPAL*

20 Years of Experience

**EDUCATION**

MA, Urban & Regional  
Planning, Highest  
Honors, University of  
Colorado, Denver

BS, Civil Engineering,  
University of  
Colorado, Boulder

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

AICP #019464

Chris, a planner and urban designer, is driven by the desire to provide clients and community members a meaningful voice in the planning and design of public spaces. With over 20 years' experience, he believes that it is the responsibility of designers to draw out the desires of those who use public space, illustrate those desires in ways that all can comprehend, and engage stakeholders in a way that builds trust. Chris works on projects of all scales, from community planning to the detailed design of public spaces, and is particularly fond of projects that tackle social and physical challenges.

- Principal, Downtown Ogden Master Plan, **City of Ogden (UT)**
- Project Manager, Downtown Denver Parks & Public Spaces Master Plan, **Denver Parks and Recreation and the Downtown Denver Partnership (CO)**
- Principal, West Jordan and Midvale Station Area Plans, **West Jordan and Midvale (UT)**

**DESIGNWORKSHOP**

UN. ND CAPABILITY,  
EXISTING LAND USE DEVELOPMENT.  
AND URBAN DESIGN SUPPORT



**JESSICA GARROW**

*DESIGN WORKSHOP LAND USE PRINCIPAL*

15 Years of Experience

**EDUCATION**

Master of City and Regional Planning, Ohio State University  
Bachelor of Political Science, University of Colorado

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

AICP  
Lean Six Sigma Green Belt

Jessica is a community development professional with over fifteen years of experience and a proven track record of successful planning implementation and community engagement. she has effectively managed significant and complex projects and budgets, worked to craft innovative planning policies, and promoted sustainable comprehensive planning. Prior to Design Workshop, Jessica worked as a land use planner and Community Development Director for the City of Aspen. During that time, she worked on economic development plans, award-winning and broad community engagement strategies, the Comprehensive Plan and a number of overhauls to the Land Use Code.

- Principal, SLC Building Height and Pedestrian Code Revisions, **Salt Lake City (UT)**
- Principal, Ogden Downtown Land Use Code Update, **City of Ogden(UT)**
- Principal, San Miguel County East End Plan, **San Miguel County (CO)**


**TRANSPORTATION LEAD**
**MATTHEW LONG**

*VICE PRESIDENT, DIRECTOR OF PUBLIC TRANSIT & PASSENGER RAIL*

17 Years of Experience

**EDUCATION**

MA, Urban Planning  
University of Kansas

BA, U.S. History  
University of Kansas

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Tennessee Public  
Transportation  
Association

Colorado Association  
of Transit Agencies

Colorado Electric  
Vehicle Coalition -  
Transit

Denver South  
Organization

Middle Tennessee  
Transit Alliance

AASHTO Technical  
Assistance Program  
(MTAP) Committee

American Public  
Transportation  
Association

WSP Global Academy  
for Rail & Transit

Matthew is a public transit lead expert, project manager, and urban planner with more than 17 years in the transit industry. He brings national experience working with agencies and DOTs across the United States and is a passionate transit advocate and user who has dedicated his career to transit planning, funding, and operations.

Prior to joining WSP, Matthew spent many years working as a strategic planner assisting transit agencies efficiently operate fixed route, demand response, and streetcar systems. He also led the State of Tennessee public transit office responsible for administering FTA grant program funds and providing compliance oversight of urban and rural transit operators. Matthew continues to expand his transit skills and expertise at WSP with consultative leadership and focus on transit communities and development, BRT corridor and alternative analysis, and capital grant programming.

- Transportation Lead, Utah Transit Authority (UTA) Headquarters Programming & Design, **UTA (Salt Lake City, UT)**
- Lead Planner, Federal Transit Administration (FTA) Grant Reconciliation, **Rock Region METR (Little Rock, AR)**
- Deputy Project Manager, Summerhill BRT Alternative Analysis, **Metropolitan Atlanta Rapid Transit (MARTA)**
- Transit Service Expert, Knoxville Broadway BRT-lite Alternative Analysis, **City of Knoxville (TN)**

**PUBLIC & PRIVATE UTILITIES,  
PUBLIC SAFETY, SCHOOLS,  
PARTS 8-RECREATION,  
AID ASSESSMENT REPORT **LEAD****



**AMY DICARLANTONIO, AICP, ENV SP, LEED AP BD+C**  
**VICE PRESIDENT, URBAN AND ENVIRONMENTAL**  
**PLANNING**

23 Years of Experience

**EDUCATION**

MSc, City Design  
& Social Science,  
The London School  
of Economics and  
Political Science

Professional  
development program  
in architecture/urban  
planning, Harvard  
University. Graduate  
School of Design

BA, Art History,  
Rutgers University

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Certified Planner,  
American Institute of  
Certified Planners

LEED Accredited  
Professional  
(Building Design and  
Construction), Green  
Building Certification

Envision Sustainability  
Professional, Institute  
for Sustainable  
Infrastructure

American Public  
Transportation  
Association

WSP Global Academy  
for Rail & Transit

With more than 20 years of national and international experience, Amy DiCarlantonio has held a variety of roles including national practice lead for planning, regional manager, and program and project manager. She has a diverse portfolio of project experience spanning master planning and urban design, community resiliency, environmental planning, and federal planning for the Department of Defense. A certified planner, Amy specializes in sustainable development and incorporates forward looking strategies to enhance community resiliency in a variety of planning efforts. Much of her work has focused on the intersection of science and planning which promotes a holistic approach to planning with a specific emphasis on smart growth and community resiliency.

Amy is skilled at integrating various technical disciplines for unique planning and design projects. She has managed sustainability plans, master plans focusing on smart growth, site analyses, green infrastructure, transit-oriented development, and formulation of sustainable design guidelines and land use plans. As a LEED Accredited Professional, she also has created sustainable development frameworks that provide benchmark considerations for future environmentally responsible planning and site design work. Her background in sustainable design principles has informed her approach to resiliency planning and the crossover with emergency management. Throughout her planning career, Amy has led and supported various public participation and community outreach programs including developing programs for city and state clients.

Project Manager, Resilient New Jersey Atlantic County Coastal Region (ACCR) - Regional Resilience and Adaptation Action Plan, **New Jersey Department of Environmental Protection (NJ)**

Project Manager, Colorado Resiliency Framework, **Colorado Resiliency and Recovery Office (CRRO)**

- Planner, Colorado Resiliency Framework, El Paso Local Plan, **State of Colorado (CO)**



**HISTORICAL & CULTURAL FACILITIES LEAD****TED ROBERTS, M.A., RPA****SENIOR ARCHAEOLOGIST**

23 Years of Experience

**EDUCATION**

BA, Anthropology,  
Wayne State  
University

MA, Anthropology  
(Archaeology),  
Northern Arizona  
University

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Registered  
Professional  
Archaeologist  
(67579909)

Secretary of the  
Interior's Professional  
Qualification  
Standards

New Mexico  
Archaeological  
Council

Archaeological Society  
of New Mexico

NM SHPO (CPRC)  
Principal Investigator/  
Project Director

Arizona Bureau of  
Land Management  
Cultural Resource  
Use Permit (CRUP),  
Principal Investigator

Ted Roberts has more than 23 years of archaeological consulting experience across all regions of the U.S., including projects in 20 states. A Secretary of Interior qualified archaeologist and historian, Ted has managed hundreds of projects ranging from small surveys and monitoring projects to multi-year data recovery efforts- all in support of clients' goals. Areas of expertise include program and project management, technical writing, and cultural/heritage resource regulatory compliance at the federal, state, and local levels.

Formerly a cultural resources practice lead in New York City and southern California, and with specialties in the archaeological and regulatory environments of the American Southwest, California (CEQA), and Southeast U.S., Ted has abundant experience with project organization, implementation, and successful completion.

Principal Investigator, North Tank Class III Cultural Resources Survey, **New Mexico State Land Office (Socorro County, NM)**

- Principal Investigator, Cultural Resource Inventory for the Bridge Replacement Over the Rio Grande/NM 500, **NMDOT (Bernalillo County, NM)**
- 11 Principal Investigator, Cultural Resource Inventory for the NM 31/NM 128 Roadway Improvements Project, **NMDOT (Eddy and Lea Counties, NM)**
- 11 Project Director, Lower Taos Canyon Cultural Resource Survey, **Camino Real Ranger District, Carson National Forest, (Taos County, NM)**

'HISTORICAL & CULTURAL' FACILITIES LEAD



**JENNIFER HYRE**

*ENVIRONMENTAL & PUBLIC INVOLVEMENT (PI) LEAD*

22 Years of Experience

**EDUCATION**

Masters Certificate Program, NEPA, Utah State University  
 BS Environmental Science, Juniata College

**CERTIFICATIONS/ LICENSES/ MEMBERSHIPS**

FAA Qualified Airport Wildlife Biologist  
 U.S. Fish and Wildlife Service Recovery Permit for NM, AZ, NV, and CA  
 Wetland Delineator Certification: NM

**OTHER LANGUAGES**

French (fluent)

Jennifer has managed multiple on-call contracts throughout New Mexico and specializes in multi-disciplinary environmental compliance, permitting, and mitigation needs for local government, public works, and land development projects. She has extensive experience with high-profile public involvement, environmental clearances, and cultural resources management. Jennifer and her local team developed NMDOT's first ever Public Involvement Guide under the existing statewide engineering on-call contract. This practical resource guide for agency and consultant staff promotes consistent and thoughtful planning for public involvement during project development.

- NM 599 and Via Veteranos Intersection, **NMDOT (Santa Fe, NM)**
- Project Manager, Environmental On-Call - NEPA Public Involvement Guide, **NMDOT (Statewide, NM)**
- Environmental & PI Lead, NM 500 Rio Bravo Bridge Replacement, **NMDOT (Albuquerque, NM)**
- Environmental Lead, Roswell Airport Wildlife Management Plan Review, **Roswell Airport (Roswell, NM)**



## ENVIRONMENTAL SERVICES / NATURAL RESOURCES LEAD

### JOANNA FRANKS

#### SENIOR ENVIRONMENTAL PLANNER

13 Years of Experience

#### EDUCATION

S.S., Fish, Wildlife, and Conservation Ecology; New Mexico State University

#### CERTIFICATIONS/ LICENSES/ MEMBERSHIPS

Wetland Delineation Certification, Wetland Training Institute

Hazwoper Certified  
U.S. Fish and Wildlife Service Recovery Permit for NM

Yellow Billed Cuckoo trained and certified, U.S. Fish and Wildlife Service

Southwestern Willow Flycatcher trained and certified, U.S. Fish and Wildlife Service

Rio Grande Silvery Minnow Permitted (Eggs)

Joanna has a background in Fish, Wildlife, and Conservation Ecology. She has extensive knowledge in New Mexico and the species within the rivers throughout the state. She has completed various surveys for wetland delineations of the Rio Grande and Santa Fe River. Joanna has experience coordinating with the USFWS, Interstate Streams Commission and US Corps of Engineers (USACE) in New Mexico, as well as other state wildlife agencies, watershed, vegetation surveys, wetlands, federal natural resources management plans, aquatic resources, and endangered species. Her unique experience includes BIA and Section 7 consultation, biological surveys, 401/404 CWA permitting, and Section 106 and tribal consultation for the following:

- Project Manager, NM 4/BIA EA and Section 7 Consultation, Biological Services, 401/404 CWA Permitting, Section 106 and Tribal Consultation, **NMDOT & Pueblo of Jemez (NM)**
- Environmental Project Manager, Tsayatoh Road/BIA EA and Section 7 Consultation, Biological Services, 401/404 CWA Permitting, Section 106 and Tribal Consultation, **Navajo Department of Transportation (NM)**
- Environmental Project Manager, Manuelito Road/BIA EA and Section 7 Consultation, Biological Services, 401/404 CWA Permitting, Section 106 and Tribal Consultation, **Navajo Department of Transportation (NM)**
- Environmental Planner, City of Santa Fe 2020 On-Call Design Services, **City of Santa Fe (NM)**

II INSTITUTIONAL STRUCTURES LEAD



**ERYCA DINSDALE, PE, PMP**

**SENIOR VICE PRESIDENT, ADVISORY SERVICES**

25 Years of Experience

**EDUCATION**

BS, Civil Engineering,  
Carnegie Mellon  
University

Certificate in Public  
Management,  
Willamette University

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Professional Engineer,  
Oregon (84332 PE)

Project Management  
Professional (30863}

Certified Change  
Practitioner (Prosci)

Lean Six-Sigma  
Certified

Eryca Dinsdale leads U.S. Advisory Service's Business Transformation national practice area. She has over 20 years of infrastructure experience, specializing in business improvements that drive organizational results with actionable options, recommendations, and implementation support. She is adept at understanding and then translating Agency goals and objectives with technical requirements and solutions.

Throughout her career, Eryca led teams and organizations across the asset lifecycle - leading successful programs and transforming service delivery. Before joining the firm, Eryca held executive positions in a state department of transportation and asset management positions at a large consumer-product corporation.

- Project Manager, Organizational Assessment - San Mateo County Express Lane Joint Powers Authority (SMCELJPA), **SMCELJPA (CA)**
- Organizational Assessment Task Lead, State-owned Express Lanes - 1-5 between Tustin and Buena Park ConOps Development, **Caltrans (Orange County)**
- Project Manager, Agency-Wide Strategic Plan Update - Vision 2028, **Los Angeles County Metropolitan Transportation Authority (CA)**
- Project Manager, Wyoming Department of Transportation (WYDOT) Road Usage Charge Study - Organizational Structure Design, **WYDOT (WY)**



## INSTITUTIONAL STRUCTURES SUPPORT

### ROB DIADAMO

#### SENIOR DIRECTOR, ADVISORY SERVICES

26 Years of Experience

#### EDUCATION

MPA, Harvard University, Kennedy School of Government  
 JD, Boston University School of Law  
 BA, University of Virginia

#### CERTIFICATIONS/ LICENSES/ MEMBERSHIPS

Board of Bar Overseers,  
 Massachusetts

Rob DiAdamo leads complex organizational and strategic planning efforts for WSP's U.S. Advisory Service's Business Transformation practice. As a former senior public sector executive and attorney, he achieves results in complex environments and understands the nuances of managing large, multifaceted organizations. Rob has over twenty-three years of experience in the public and private sectors focused on organizational improvements, transportation operations, and infrastructure projects, including over twelve years of leadership experience in senior policy, management, and legal positions in state government.

Prior to WSP, Rob served as the Executive Director for Commuter Rail at the Massachusetts Bay Transportation Authority, overseeing commuter rail and ferry operations. He currently teaches Local Government Law at Boston University School of Law.

- Task Lead, Hudson Bergen Light Rail Line - Procurement and Technical Documents, **New Jersey Transit (NJ)**
- Team Member, Communication Based Train Control - Interdepartmental Collaboration Plan, **New York MTA (NY)**
- Task Lead, Project Manager, Commuter Rail Service and Maintenance Assessment: Assessment of New Regional Commuter Rail Entity, **Dallas Area Rapid Transit (TX)**

Team Member, Agency Strategic Plan Update, **Tampa Hillsborough Expressway Authority (FL)**



## GROWTH SCENARIO PLANNING LEAD

**SARA KHOEINI, Ph.D.****LEAD DATA SCIENTIST**

13 Years of Experience

**EDUCATION**

Ph.D., Georgia  
Institute of  
Technology  
Transportation  
Systems Engineering  
MS, Clemson  
University  
Transportation and  
Highway Engineering  
BS, K.N.Toosi  
University of  
Technology Civil  
Engineering

**OTHER  
LANGUAGES**

Persian (fluent)

Sara Khoeini specializes in travel demand modeling and forecasting, with expertise in planning-based model applications, equity analysis, and systems dynamics. Before joining WSP, she served as an Assistant Research Professor of Transportation Systems at Arizona State University for five years. Sara obtained her Ph.D. from the Georgia Institute of Technology in Transportation Systems Engineering.

Sara has applied her travel demand model application and data analysis skills in planning projects including the San Diego plan update called Blueprint. She has also explored the application of Systems Dynamics as a data-driven scenario planning tool for Southern California. Her strong interest in equity led her to develop the Access Equity Calculator for SCAG ABM to connect accessibility-based equity evaluation to ABM systems. Beyond her professional roles, Sara is a committee member of TRB's AED20 (Urban Transportation Data and Information Systems) and actively participates in its equity group.

Deputy Project Manager and Data Analytics Tasks Lead, Arizona Statewide Travel Demand Model (AZTDM), **ADOT (AZ)**

- Data Analytics Tasks Lead, Long Range Transportation Planning and Mobility, **Los Angeles Metro (CA)**
- Scenario Planning Task Lead, I-405 Sepulveda Pass Express Lane Feasibility Study, **Los Angeles County Metropolitan Transportation Authority (CA)**
- Main Analyst, Vehicle Miles Traveled (VMT) Generation Visualization and Analysis Tool, **Orange County (CA)**

**IMPLEMENTATION & CAPITAL PROGRAMMING LEAD**



**ALFONSO HERNANDEZ**

**ASSISTANT VICE PRESIDENT, ADVISORY SERVICES**

18 Years of Experience

**EDUCATION**

BS, Public Justice Administration, San Diego State University

Grant Writing and Management Certification, California State University, San Bernardino

Grants Management Certificate Program, Management Concepts

Alfonso Hernandez offers public sector grant experience, from pre-award to post-award, which includes grant writing, grants management and identify funding opportunities. Alfonso has worked for various government organizations at the local and regional levels. He is a subject matter expert in the field of government grant development, which includes federal, state, and local grants, and has a large portfolio of grant experience that addresses across each department for government organizations. Collectively throughout his career, Alfonso has secured more than 200 competitive grant applications in excess of \$800 million, while maintaining a high success rate.

He is also a subject matter expert in grants management and ensuring agency-wide compliance with funding requirements for each respective funded project. He has led audit and sub-recipient monitoring efforts on both sides of the audit as a reviewer and recipient, including USDOT/FTA triennial reviews and ongoing monitoring of sub-recipients.

- Project Manager, Grant Writing and Administration Services, **Pinellas County (FL)**
- National Advisory Lead, FY 2021- FY2022 US Department of Transportation (USDOT) RAISE Grant Applications, **USDOT**
- Project Manager, Arizona Department of Transportation (ADOT) Grant Writing On-Call, **ADOT (AZ)**
- 111 Project Manager, Grants Management and Professional Services, **Golden Gate Bridge, Highway, and Transportation District (San Francisco, CA)**

## IMPLEMENTATION &amp; CAPITAL PROGRAMMING SUPPORT

**PETER WALDT***DIRECTOR, COMMERCIAL PLANNING & DEVELOPMENT*

41 Years of Experience

**EDUCATION**

MS, Public Policy Analysis (Quantitative Analysis and Economic Development), University of Rochester

BA, American History (Early American Economic History)

**CERTIFICATIONS/LICENSES/MEMBERSHIPS**

Region Plan Association: Member  
New Jersey Council

Peter Waldt is Senior Vice President with WSP USA Advisory Services. He leads WSP's efforts in Value Capture and Real Estate Transactions. He has significant experience in asset monetization and Transit Oriented Development transactions, particularly in creating the financial architecture of a project and land value capture. Further, he has lengthy experience in commercial lending and real estate finance, notably over 30 stadiums and arenas.

- Senior Director of Commercial Planning and Development, Non-fare Revenue Generation and Major Station Redevelopment Transactions, including Sunnyside Yard, Chicago, Baltimore, Philadelphia, New York, and Washington, DC, **Amtrak (Philadelphia, PA)**
- Director of Real Estate Development, NYJets for the West Site Rail Yard/Stadium project and Forrest City Ratner/Atlantic Yards project including Barclays Arena, **New York Metropolitan Transportation Authority (NY)**
- Director of Real Estate Development, Broward Commuter Rail South- Land Use and Economic Development Study, **Florida Department of Transportation (FDOT)**
- Director of Real Estate Development, Ft. Worth East Lancaster East Corridor & Subregional Study, **Texas Department of Transportation (TxDOT)**



## EQUITY & INCLUSION LEAD

### GABI BRAZZIL

#### SENIOR EQUITY CONSULTANT

12 Years of Experience

#### EDUCATION

BS Communications  
and Sociology,  
University of  
California - Davis

Gabi Brazzil co-founded the national professional services group Equity Center of Excellence at WSP, dedicated to supporting clients in practicing and delivering equity in community and infrastructure projects. Gabi specializes in integrating equity into technical decisions and policies, with a core competency in transportation planning. Gabi's national experience guides clients in building public trust, establishing measurable equity goals, making proportionate public investments, and identifying and distributing equitable project benefits in their locale. In addition to Gabi's technical background, Gabi is also trained in DEi leadership, earning a certification from the National Diversity Council Diversity First Program.

- Equity Lead, Link 21 Planning and Engineering Services, **Bay Area Rapid Transit (Bay Area, CA)**
- Equity Lead, Complete Streets Handbook, **Bay Area Rapid Transit (City of Milwaukee, WI)**
- Contract Manager, Equity Consulting Services, **Metropolitan Transportation Commission (Bay Area, CA)**
- Project Manager, District 121-5 Managed Lanes, Equity Study, **Caltrans (Orange County, CA)**

## EQUITY &amp; INCLUSION SUPPORT

**SEAN SCOTT***SENIOR EQUITY CONSULTANT, URBAN DESIGNER*

8 Years of Experience

**EDUCATION**

MCP in City & Regional Planning, Urban Design Concentration, University of Pennsylvania

BA in Urban Studies & Music, Brown University

**CERTIFICATIONS/LICENSES/MEMBERSHIPS**

American Planning Association

Sean is a Senior Equity Consultant and Urban Designer for WSP's Equity Center of Excellence and supports WSP's national Urban Design and Placemaking practice. Sean comes from a background in urban design, planning, and community development. He understands the relationship between the built environment and its effect on social integration, and the complexities of integrating mixed-use development and public spaces with transportation infrastructure, employing a sociologic approach for a more racially just, equitable, contextual, and responsive urban landscape. Sean specializes in developing equity approaches, with a focus in urban design and planning processes that tackle underlying inequities for more equitable planning frameworks and design visions. He has national experience serving as an equity coordinator and task lead on various projects crafting project approaches through an equity lens and developing equitable urban design strategies and visions that reflect community identity.

- Equity Coordinator, Transit-Oriented Development Roles, Visioning, Viability & Tools Analysis Study, **Connecticut Regional Council of Governments (CT)**
- Equity Lead, Near-term Public Realm Concepts, **Newark Penn Station (NJ)**
- Urban Designer, Elevate Transit: Zoning for Accessibility, **Metropolitan Transportation Authority (New York, NY)**
- Urban Designer, Equitable Development Around Transit (EDAT) Study, **City of Raleigh (NC)**



SMART CITIES LEAD

## JACOCRONJE

### DIGITAL SOLUTION ARCHITECT

16 Years of Experience

#### EDUCATION

Smart City Technology Design, MIT USA

BS and BE, Electrical and Computer, University of Cape Town, South Africa

#### CERTIFICATIONS/ LICENSES/ MEMBERSHIPS

Professional Engineer (RSA)

Certified Data Centre Professional (EXIN)

PMP

IEEE, SAIEE

Engineering Council of South Africa (ECSA)

#### OTHER LANGUAGES

Afrikaans (fluent)

Jaco Cronje is a digital solutions architect within WSP's Innovation Advisory practice. Having joined WSP in 2008, he brings with him a wealth of international experience in the fields of electrical, renewable, and digital engineering. He has pioneered numerous technologies across Africa in the Smart Cities space as well as Residential, Retail, Commercial and Leisure environments. As a registered electrical engineer with an extensive background in business consulting, Jaco brings clients and technologies together for unparalleled synergies.

Jaco works on the development of system architectures and deployment of enterprise level digital platforms, data collection, analysis techniques, facility cybersecurity and control strategies in the built environment to find business intelligence and operational efficiencies for our clients. He brings an attentive detail to every project he touches playing an intricate role throughout the entire lifespan of our projects from the advisory stage through design to contract administration.

- Digital Solutions Architect, Smart Integrated Building Management & Data Analytics System, **San Francisco International Airport (CA)**
- 11 Technology Lead, One Central (Landmark), **City of Chicago (IL)**
- Technology Lead, The River Mile, Smart District (by Revesco), **City of Denver (CO)**
- Smart City Lead, City of Cape Town Smart City Strategy, **City of Cape Town (South Africa)**



## .MUNICIPAL INFRASTRUCTURE LEAD

### LARISSA JAMES

#### SENIOR VICE PRESIDENT, ASSET MANAGEMENT BUSINESS ADVISORY

35 Years of Experience

#### EDUCATION

BE, James Cook  
University of North  
Queensland, Australia

#### CERT/FICAT/ONS/ LICENSES/ MEMBERSHIPS

Certified Benefits  
Realization  
Practitioner

Member of the Asset  
Management Council,  
Australia

ISO55000 Gap  
Assessment

Larissa James has 25 years of experience in asset management consulting within several sectors including rail and airport transportation; water; electricity and gas utilities in the United States and internationally. Larissa's experience spans the full range of asset management assignments including gap assessments, improvement plan development, and implementation within operations, maintenance, capital planning and delivery.

Prior to joining WSP, Larissa was a member of the leadership team at Aurizon Pty Ltd (AZJ). Larissa managed a team of over 30 professional staff responsible for improving operational performance through better asset management. She was responsible for implementation of the Asset Management Improvement Program, an enterprise asset management (EAM) system, asset data governance, decision support tools, strategic planning, asset investment planning, and risk management supporting both maintenance and capital delivery organizations.

- Principal, Asset Management Assessment and Improvement Plan, **Amtrak (nationwide)**
- Program Manager and Technical Director, Enterprise Asset Management (EAM) Program Business Partner Governance, **Port Authority of New York and New Jersey Enterprise Asset Management Division**
- Program Manager and Technical Director, Enterprise Asset Management (EAM) Program Business Partner Operations, **Port Authority of New York and New Jersey Enterprise Asset Management Division**
- Technical Director, Aviation Maintenance and Asset Management Best Practices, **New York/New Jersey**




**MUNICIPAL INFRASTRUCTURE LEAD**
**SCOTT COGAN, PE, CQM**

*SENIOR PROJECT MANAGER & DIRECTOR OF TRANSPORTATION*

24 Years of Experience

**EDUCATION**

BS, Civil Engineering,  
University of Missouri

**CERTIFICATIONS/  
LICENSES/  
MEMBERSHIPS**

Certified Quality  
Manager:US

Scott Cogan serves as a senior director of transportation in WSP's Kansas City, Missouri office and the civil lead for WSP's Kansas City, Lincoln, and Wichita offices. He also serves as the regional quality manager for WSP's Central Region, consisting of 13 offices around the Midwest. Scott has 20 years of design and project management experience in the civil engineering industry. He has experience in highways, bridges, municipal streets, design-build, and quality management.

- Civil Lead, Kansas City 2018 On-Call Planning Services, **Kansas City (MO)**
- Project Manager, KDOT On-call Engineering Services, **Kansas Department of Transportation(KDOT)**
- Quality Control Manager, Dallas Southern Gateway Design-build Project, **TxDOT**
- Project Manager, Interstate 49 Frontage Road Design Services, **City of Grandview (MO)**



WATER LEAD



**REBECCA BORKER, MPA**  
*VICE PRESIDENT, UTILITY MANAGEMENT*  
*PRACTICE LEADER-WATER*  
 27 Years of Experience

**EDUCATION**

Watershed Hydrology  
 BS, University of  
 Arizona, AZ  
 Master Public  
 Administration,  
 Seattle University, WA  
 Lean Six Sigma  
 Management Green  
 Belt, University of  
 Washington

Rebecca Borker is leading WSP's Water Utility Management Consulting Practice in the Pacific Mountain West District. She is also the Branch Lead for the Pacific Northwest Branch of Institute of Asset Management - USA (IAM-USA). Rebecca is a strategic, collaborative leader and brings a wealth of knowledge and experience from working in the Public and Private Sectors. She is well-versed enhancing collaboration and partnerships with stakeholders across business lines to meet business needs. Rebecca is committed to meeting the needs of clients and the communities they serve by providing a future ready approach tailored for the client. This entails helping clients identify and address infrastructure and/or organizational issues by proposing realistic solutions that meet their current and future business needs/objectives.

- Technical Expert, Thurston County Storm, and Surface Water Utility Comprehensive Study, **Thurston County Public Works (WA)**
- Water Task Lead, Risk-Based Lifecycle Cost Alternatives Analysis, **City and County of Honolulu (HI)**
- Project Manager, Sewer Pipeline Condition Assessment Business Process, **Portland Bureau of Environmental Services (OR)**
- Quality Assurance and Control, Colorado Department of Public Health - Environment Lead and Copper Service Line Technical Assistance Program, **Colorado Department of Public Health (CO)**



## 2. ORAL PRESENTATION

WSP acknowledges and is prepared to conduct an oral presentation of our qualifications and plans if the City of Santa Fe requires.

### 3. MANDATORY SPECIFICATION

#### UNDERSTANDING & APPROACH

*Santa Fe-the City Different-is* comparatively ancient in America but its legacy goes back much further than what is classically understood to be Santa Fe's founding by the Spanish. Indigenous peoples have lived in Santa Fe and well beyond for millennia, shaping what is today and what it can be tomorrow. Other cultures have and continue to shape the city. Santa Fe is known for its historic downtown, the Plaza, arts community, natural setting and more. During the 20th century, it also developed much like cities across the United States, with production-built suburban neighborhoods served by roads designed for the automobile and unfortunately, exclusionary practices. It is the capital of New Mexico-the oldest capital in the United States-yet its economy is predominately tourism and government. There are vast economic disparities, a lack of attainable housing and limited mobility choices. Santa Fe is a wonderful, magical place that experiences challenges similar to many cities but its history, diversity and being Different gives it many opportunities other cities lack. An updated General Plan can help focus the community in heading toward a common vision to capitalize or create opportunities and innovatively solve challenges.

#### SANTA FE'S FY2023-24 BUDGET GOALS

- More and attainable housing
- Parks and neighborhood amenities
- Family-friendly and neighborhood focused
- Growth that is consistent with and protective of Santa Fe's way of life
- Sustainability as a watchword of the City
- Invest in supporting the workforce, growing opportunities for all
- A better future
- Sustaining innovations
- A just Santa Fe

#### It Is Time for an Overall Update and Focusing on Strategic Areas

Much about the 1999 General Plan undoubtedly remains valid and useful, but its vintage is still 1999-all agree it's time to comprehensively update the General Plan. Some changes will be applicable citywide. Others will focus on strategic areas due to opportunities, challenges and identified priorities. Both scales will be determined during the process-a process that WSP has designed to be highly effective in updating the plan.

#### Increasing Cultural Awareness

Santa Fe's Culture, History, Art, Reconciliation and Truth (CHART) process was and continues to be a pivotal epoch for Santa Fe that is still playing out because there is much to do. Updating the General Plan is part of that process of atonement and meaningful, tangible change to reflect Santa Fe's rich cultural tapestry, regardless of power and wealth. Too often General Plans focus on growth and development. Neither will be occurring across most of the developed city. A General Plan must be broader to maintain, enhance, mitigate, change, improve, and accommodate for today and tomorrow in a manner that is guided by Santa Fe.

**Diversification to Inclusively Serve Diversity, Increasing Access to Opportunity**

Like most American cities, Santa Fe needs more diversity of housing types in the right places and coordinated with more mobility choices. Both are critical, leading ingredients to increased economic diversity. No city is "built-out." Cities are always changing and some areas are well-suited to change. Some change is needed to seize opportunities and address challenges. How that change is sustainably and equitably accomplished is a key indicator for the success of this General Plan Update. A thoughtful process, backed by technical work and engagement with deep experience is what the WSP team provides to support the City.

**Regionalism for Collaboration**

Santa Fe has far-reaching influence, from Albuquerque to Los Alamos; Taos and Espanola; many pueblos; and the County and MPO. That represents a lot of potential resources warranting stronger collaboration. The General Plan can suggest what is possible, with an implementation plan and governance framework to facilitate regionalism. Transit and housing are two examples of how a regional approach can improve quality of life and advance a more just Santa Fe.

**Stewardship, Wellbeing, and Resiliency in Harmony with the Environment**

Santa Fe sits within a dry climate that is warming and drying. This has stressed water resources in particular today, with more stresses coming with a changing climate. WSP is a leader in resiliency, sustainability, and equity because we envision, plan, design, and deliver transformational infrastructure projects-actual projects, not theories that sit on a shelf.

**A FEW THEMES IN OUR TEAM'S SCOPE OF WORK**

*Clearly Defined Process and Governance*

*Scenario Planning to Promote Consensus Building*

*Implementation to Drive Outcomes and Capital Programming*

*Digestible and Streamlined Document to Ease Everyday Usage*

*Technological Innovations Begin Now*



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## INTRODUCTION TO PROPOSED ALTERNATIVE PROCESS

The RFP offered the opportunity for proposers to illustrate critical and strategic thinking by suggesting an alternative process. WSP is **proposing an alternative process, outlined in the table below, with a crosswalk table showing the relationship between the process in the RFP.** This process is proposed to allow a progression of steps to create the building blocks that can effectively result in consensus building. By aligning to a stepwise, building blocks approach, evident stage gates are defined to establish a clear milestone with interim decision-making. Deliverables and a readiness review are aligned to these stage gates at which the Planning Commission and Governing Body will be asked to confirm readiness to advance into the next step. This process also allows the project to potentially be completed much faster-2.5 years instead of four-because of its progressive characteristics, project management rigor and alignment with the public review process. This approach can and will still be coordinated with the Land Development Code (LDC) Update. It is important that the General Plan Update be completed timely due to its vintage, urgent need for updating and to support informing the details of the LDC Update, as the LDC is an implementation tool guided by the General Plan. General Plans are higher level documents, with less detail than land use codes, so it takes less time to complete. A four-year work program risks community fatigue, evolving issues, and missed opportunities. Interim LDC regulations can be deployed, pending completion of the LDC, to ensure linkage between the updated General Plan and eventual LDC update.

|  | CY2024 |    |    |    | CV2025 |    |    |    | CY2026 |    |    |    | Phase 1 |    |    | Phase 2 |    |    | Phase 3 |    |    |    |  |
|--|--------|----|----|----|--------|----|----|----|--------|----|----|----|---------|----|----|---------|----|----|---------|----|----|----|--|
|  | Q2     | Q3 | Q4 | Q1 | Q2     | Q3 | Q4 | Q1 | Q2     | Q3 | Q4 | Q1 | Q2      | Q3 | Q4 | Q1      | Q2 | Q3 | Q4      | Q1 | Q2 | Q3 |  |
| <b>STEP 1</b><br>Mobilization and Understanding                                      |        |    |    |    |        |    |    |    |        |    |    |    |         |    |    |         |    |    |         |    |    |    |  |
| <b>STEP 2</b><br>Vision and Goals  |        |    |    |    |        |    |    |    |        |    |    |    |         |    |    |         |    |    |         |    |    |    |  |
| <b>STEP 3</b><br>Scenario Planning   |        |    |    |    |        |    |    |    |        |    |    |    |         |    |    |         |    |    |         |    |    |    |  |
| <b>STEP 4</b><br>Development of Preferred Plan                                       |        |    |    |    |        |    |    |    |        |    |    |    |         |    |    |         |    |    |         |    |    |    |  |
| <b>STEP 5</b><br>Work Program and Funding Plan                                       |        |    |    |    |        |    |    |    |        |    |    |    |         |    |    |         |    |    |         |    |    |    |  |
| <b>STEP 6 FORWARD</b><br>Governing Body Action+ Implementation and Evaluation        |        |    |    |    |        |    |    |    |        |    |    |    |         |    |    |         |    |    |         |    |    |    |  |
| <b>STEP 7, ONGOING</b><br>Administrative Coordination + Engagement and Communication |        |    |    |    |        |    |    |    |        |    |    |    |         |    |    |         |    |    |         |    |    |    |  |

## FOUNDATION: THE FIRST BUILDING BLOCKS ARE LAID HERE

What's missing and where? Who is it for and how will it help them? What are we trying to deliver and how will it be provided?

These are excellent questions the RFP posits and are critical building blocks, along with the basics that demand attention in Step 1: Mobilization and Understanding.

### STEP 1: MOBILIZATION AND UNDERSTANDING

This step is when the project is initiated, concluding the procurement process with a notice to proceed. Every step is important to advancing the General Plan Update with consensus. This step matters because it gets the project organized; undertakes an assessment to establish its purpose, need and potential with greater specificity; and identifies early guiding themes from which to support visioning and goal-setting. Foundational building blocks resulting from this step include:

- **Project Management Plan:** the playbook for undertaking the General Plan Update, which includes the scope of work, schedule, budget, organizational chart, decision-making and more.
- **Assessment Report:** a compendium that methodically studies existing conditions, trends, and themes using an evidence-based approach and further informed by public engagement.
- **Public Engagement Plan:** sets forth the strategies and tactics for communicating, educating and engaging myriad audiences.
- **Digital User Interfaces:** internal - and external-facing digital tools to manage, communicate and engage on the project.
- **Templates:** templates that provide a common communications vernacular for consistency and quality.

The revised General Plan must bring together multiple and overlapping goals in one comprehensive plan to capture the desired vision and choices related to Santa Fe's future. The plan will integrate transportation, housing and developments to meet community, economic, financial, and sustainability goals. To achieve the goals of the revised General Plan, we will build on past studies and plans tested against an understanding of existing conditions and analyze a full range of issues and challenges facing the City. The existing conditions and trends documented as part of this step will be the basis for an Assessment Report that will establish a baseline analysis of existing conditions. The WSP team will map and characterize existing conditions.

The **Assessment Report** will include the topics identified in the RFP and highlighted in detail herein, including from initial public engagement findings and the LDC Foundations body of work. It is important to have a clear understanding of what has already been accomplished in Santa Fe since 1999, the underlying fundamentals of the community, and how the General Plan Update can best address critical issues and opportunities. The Final Assessment Report will identify the following:

- Summary of existing conditions, trends and engagement findings,
- Identification of relevant planning issues in each subject area including issues identified through the public engagement process,
- Identification of short- and long-term needs and desires as defined by Santa Fe communities,
- Narrative description of steps that can be taken to address findings within each subject area, and
- Policy implications and recommendations for the General Plan.

The comprehensive Assessment Report will synthesize the analysis for each subject area, build upon the goals, strategies, and programs already defined, and incorporate the public engagement

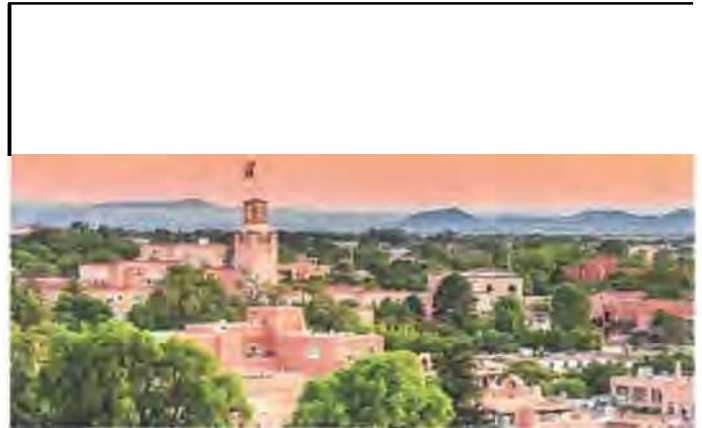


## REGIONAL TRENDS

An endeavor of this importance must be based on solid, factual market information so that the recommended typologies, development, preservation, and enhancement strategies are not just grounded in reality but are also credible and can be supported by a wide range of implementing partners and private investors.

We will prepare a thorough and objective citywide market analysis and forecast to ground the community conversation and visioning process and to form the basis of the resulting implementation strategy. The goal is to present a readable and engaging story of where Santa Fe has been, how it is projected to grow and change, and which external forces and trends are likely to shape its future. Information will make significant use of maps and infographics for use online, in print, and at presentations. Elements of the market and trends analysis will include:

- Mapping of existing uses and conditions
- Demographics (Census-based data) across all relevant indicators, showing historical trends and future forecasts where possible
- Real estate market conditions (rents, vacancy, absorption, etc.) for office, retail, hospitality, and residential uses
- Visitor behavior analysis (Placer.ai cell phone data)
- Post-COVID office and retail trends
- Impacts of regional, state, and national economic conditions on housing and commercial markets
- Housing demand for both rental and ownership (affordable and market rate)
- Opportunity site identification (vacant, underutilized)
- Planned/proposed projects



## LAND CAPABILITY ANALYSIS

Using data available from the City and other public sources, we will prepare a land capability analysis to guide growth scenario planning and development capacity. This analysis will inform the public about areas within the city that are well suited to accommodate growth and change, and areas that should either be avoided or require significant coordination. Data layers that we will consider include:

- Topography
- Utilities and Infrastructure
- Agricultural Lands
- Rivers and Arroyos
- Surface Hydrology
- Flood Plains
- RailRunner Stations and Transit Stops
- Santa Fe Trails Bus System
- Bikeways and Trails
- Parks and Open Space
- Annexation Areas
- Airport Clear Zones
- Historic Boundaries



WSP provided engineering design and construction services for the Acequia Trail Underpass in Santa Fe to provide safe and efficient connectivity of the Acequia Trail. Services included a Detailed Evaluation of Alternatives Study, which evaluated feasible alternatives such as bridge, underpass and at-grade crossing options, preparation of the Type Selection Report to evaluate structural alternatives and select the final structural system for the underpass, preliminary and final design, and full construction management and inspection services.

We engineered an innovative underpass structure to be constructed from the top down, incorporating prefabricated elements to speed up construction, minimize delays and disruptions to the public, and fit the design to site-specific conditions.

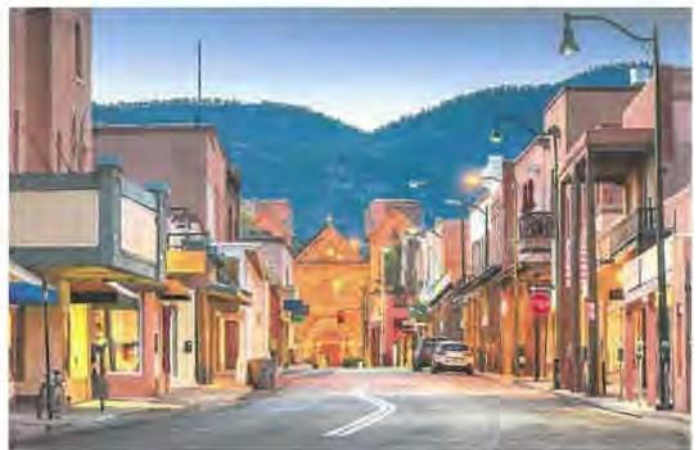
**EXISTING LAND USE DEVELOPMENT**

Santa Fe has grown significantly since the 1999 General Plan, and an analysis of what exists today is critical to determine how much land is available for potential new development, infill, and redevelopment. Our work will include an analysis of existing land uses and development, with a focus on understanding what exists today and what opportunities might be available. We will use available GIS data on zoning and land uses to map the existing development and use patterns, with a focus on identifying potential opportunity areas. Using the mapping and an analysis of the development code, we will identify infill and redevelopment opportunities that might exist. The Existing Land Use and Development section will be a comprehensive review of all land use types and

will detail the amount and type of development that is possible under the existing adopted policies and regulations. The LDC update work products will also inform this section. We will couple this information with an understanding of the fiscal sustainability work our team is completing to provide a report that details opportunities for new development, including infill and redevelopment. This information will enable the city and community to begin to prioritize development types and locations in future engagement stages.

**NEIGHBORHOODS**

Defined by character areas, land uses, key transportation corridors, and existing neighborhood associations, we will develop an official Neighborhoods and Districts map for the City. This map will consider the built form, natural characteristics, development density, the positioning of land uses and their adjacencies, and other character elements that define distinct neighborhoods of the city. The Neighborhood and District map can be a useful tool in overlaying demographic and other data to determine defined areas of need in future policy and funding scenarios.



**FISCAL SUSTAINABILITY**

Our work will incorporate a fiscal sustainability strategy to ensure that the fiscal impacts of growth are captured and that proposed projects and initiatives are feasible. As with other aspects of the General Plan Update, this work is intended to be

educational and data-driven so that the visioning process is provided with objective data to inform growth alternatives.

Working closely with Santa Fe GIS and Planning staff, we will develop a baseline model to analyze various fiscal attributes of land and property throughout the city. As different attributes may be more or less useful to different parts of the planning process, we anticipate developing a flexible model that can be adjusted quickly to illustrate different fiscal dynamics. Likely attributes to be analyzed and mapped will include:

- Property value per acre (including both land and improvements), expressed as a value per acre;
- Improvement to land value ratio (to illustrate potentially redevelopable or underutilized land);
- Tax generation per parcel (incorporating tax-exempt properties) to illustrate fiscal impact to the city and other taxing jurisdictions;
- GRT and other employment-based data to understand the impact of business activity (as available from the state and aggregated to ensure confidential business activity is not disclosed);
- GIS mapping to illustrate patterns throughout the community, combined with land use, zoning, transportation, and other data layers to understand fiscal dynamics.

During Step 3, this data will further be used to enable the scenario planning to output fiscal impacts with each alternative.

## URBAN DESIGN

This analysis will focus on elements that will contribute to Santa Fe's image as a great place to live, work and play. Public elements could include street character, street lighting, view corridors, and identity enhancement elements, including landmarks and gateways. Private elements could include parking treatments, development patterns (site planning criteria), and development character (building and landscape criteria). We will

summarize the findings in an urban design analysis to understand the qualities that are unique to Santa Fe and identify the potential for placemaking. As part of this assessment our team will conduct a field visit and a visual survey. Site survey findings will be documented with maps, photographs and a short-written description.



An urban design assessment will investigate the existing built form, including the public realm, of key sectors, special planning areas, gateways, and other important districts to identify the characteristics that either support or detract from quality development, economic vitality, social vibrancy, and civic identity. This analysis will be used in public engagement to inform spatial qualities and building form that are important to the successful implementation of development types in different land use and character zones - specifically related to city character, sector, and special area planning. Items that we will catalogue in this assessment include:

- Urban forestry
- Streetscape composition (including materiality)
- Public art, lighting, and amenities
- Landscape
- Building height and scale
- Building articulation
- Alazas and civic spaces
- Utilities
- Street composition
- Natural areas and areas with potential for restoration into the natural environment

## TRANSPORTATION

Since the development of Santa Fe's General Plan in 1999, the transportation network and connectivity has drastically changed. The range of mobility options, how transportation is used, and the need for more interconnected and responsive options for moving in and around Santa Fe have changed. It is important that the city is prepared to adapt with changing transportation needs and priorities and to leverage new transportation technologies and funding programs. This will help Santa Fe expand its network of safer, more affordable, and reliable mobility options that will also increase accessibility and ensure equitable access to community services and employment.

A review of existing transportation studies and plans identified by the City of Santa Fe (multimodal transition plan, bicycle/ped/transit plans, sustainability plan), along with the MPO's recent work on complete streets, will provide WSP with a solid understanding of the community's ideas and initiatives to expand mobility choices and create a more accessible city. A matrix will be created to ensure we integrate transportation recommendations with the goals and objectives of each existing plan and study.



The Cerrillos Road project from Saint Francis to Saint Michaels is a highly constrained corridor. The WSP team used a context sensitive design approach to prepare a complete streets solution that balanced safety, multi-modal needs, economic vitality, and environmental stewardship, including stormwater management. WSP was instrumental in forming a Project Study Team consisting of NMDOT, City of Santa Fe, Santa Fe Municipal Planning Organization, and consultant members to foster a holistic view towards meeting the needs of all agencies. Multiple public meetings and significant public and agency outreach efforts were part of the WSP efforts to date.

Using available data and material from the City, an inventory of the existing network characteristics will be compiled that can include streets and roadways, transit routes and stops, rail lines and stations, and bike and pedestrian pathways. Demographic and household trends data impacting transportation conditions will also be compiled and assessed using innovative and interactive web-based mapping applications. These tools assist us to identify travel conditions and to verify current transportation deficiencies and opportunities. From this analysis, our team will identify key performance indicators and develop improvement targets for the City to measure its mode-shift progress as it implements mobility and accessibility planning recommendations.

The **Transportation section** will be a comprehensive review and assessment of the city's multimodal transportation network that will provide a baseline of information on existing transportation conditions and services, and detail the key issues, barriers toward progress, and long-range transportation goals. The report will also provide specific data analysis and recommendations that are fiscally responsible and immediately implementable.

## PUBLIC & PRIVATE UTILITIES

The General Plan Update will closely examine the intersection between growth policies and public and private utilities and services such as water, wastewater, electricity, and gas. Consistent with the 1999 General Plan themes, sustainable growth, quality of life, and affordable housing remain key considerations for the future of Santa Fe. Demand, quality, and availability of public and private utilities are primary considerations for new development and recommended growth patterns within the city. The existing conditions analysis will include a review of baseline conditions and projections to understand the availability and need for public and private utilities in different growth scenarios. Payment methods for future public and private utilities is an additional guiding consideration that will be examined. The utilities report will be comprehensive and future-focused, specifically with City of Santa Fe water, wastewater, and stormwater utilities.

Climate change and resilience are key trends related to the availability of water and energy sources in the near and short-term future. The city budget provides evidence to Santa Fe's commitment to sustainability and being at the forefront of renewable energy and forward-looking water planning including conservation and reuse. The transition to clean energy sources within New Mexico includes solar, wind, and geothermal. As detailed in the City of Santa Fe Water Storymap, climate change is expected to reduce stream flow and mountain snowpacks throughout the southwest. Since 1995, Santa Fe has had great success in reducing water demand through conservation even with a 25-percent increase in population served. Through a pro-active water management approach, Santa Fe prioritizes using surface water when available to preserve groundwater for drought conditions. Combined with the steady increase in demand through conservation, groundwater aquifers continue to recover from past practices of excessive pumping.

Today, water is provided to the city from four different surface water and groundwater sources. The existing conditions analysis will integrate key ongoing efforts within the city including the near-term 5-Year Water Conservation and Drought Management Plan and the Santa Fe Water 2100 - a long-term Water Resource Plan to provide a comprehensive view of Santa Fe's management of water resources. The intersection with other initiatives such as the Santa Fe Living River ordinance that supports the Santa Fe riparian corridor will also be documented. The Santa Fe General Plan Update will build upon past successes and develop a coordinated blueprint that reflects sustainable growth balanced with resource management.

WSP will identify all current utility providers (public/private) in Santa Fe, with an emphasis on City of Santa Fe water, wastewater, and stormwater utilities. WSP will review and compile any Utility system Plans and Public Works Capital Plans and comprehensively display/map the existing utility system area and proposed expansion and/

or improvements necessary to accommodate growth and other updated policies. The Team will identify any inconsistencies in land use and growth projections presented in the various utility plans. In addition, the WSP team will identify proposed improvements from existing utility and capital plans to accommodate the growth and anticipated project completion dates.

We want to ensure that utilities are planned for expansion and improvements by identifying utility service efficiencies and gaps between existing conditions and proposed land use and growth projects. Our team can assist Santa Fe to holistically understand opportunities associated with utility expansion/improvements for projected land use and population growth by providing recommendations for potential project improvement/expansion opportunities between utilities to provide less public disturbance and identify potential multi-benefit projects.

Our team has experience in developing utility policies that are consistent with comprehensive plan policies. We understand how to work with existing water utilities to identify any conflicts or deficiencies in comprehensive plan policies that may affect successful utility planning and also identify utility policies that can inform comprehensive plan policies.

## HISTORICAL & CULTURAL FACILITIES

Arts, culture, and historic preservation are of crucial importance to the City of Santa Fe. Santa Fe is a community that is rich in history and cultural diversity, with strong traditions and a distinctive sense of place. These elements collectively form the foundation of a unique identity. The local arts scene is a vibrant platform for creative expression, fostering a deep sense of community and driving economic development.

Historic preservation plays a vital role in maintaining the city's legacy, providing tangible connections to Santa Fe's past while shaping its character for future generations. The combined efforts in arts, culture, and historic preservation make a significant



contribution to Santa Fe's quality of life, creating a city that is dynamic, diverse, and deeply rooted in its history. As part of our scope of work, the WSP team will undertake the following tasks:

- Collaborate with ongoing initiatives, organizations, and City and State departments to prepare a comprehensive catalogue of existing and prospective arts, cultural, and historic resources across the city;
- Participate in the process of identifying, establishing, and assessing the viability of a possible Arts & Cultural District;
- Undertake an examination and valuation of historic resources, including a thorough review of the city's five historic districts and adjacent areas;
- Investigate and evaluate cultural, prehistoric, and paleontological resources; and Consider outcomes from the City's CHART process in the development of recommendations.



## PUBLIC SAFETY

Public safety is a common thread that will inform recommendations and implementation policies in several of the General Plan Update elements. As defined in the city budget, safety is an overarching priority for Santa Fe. Multiple streams of revenue are available, including funds from the Federal

government, to invest in safety initiatives alongside social, economic development and job training, and community health programs. Our team will take a comprehensive view in developing the Public Safety section by exploring the intersection of several themes as they relate to public safety such as social programs, the environment, community health, and economic development. A desktop review of plans such as the City of Santa Fe Office of Emergency Management 2018-2022 Strategic Plan and the Hazard Mitigation Plan will lay the groundwork for an understanding of public safety goals, strategies, and initiatives that will inform the development of the Santa Fe General Plan Update. The WSP team will document existing conditions and trends by incorporating input from key community health and safety stakeholders such as Santa Fe Police Department and Fire Department, Office of Emergency Management and Community Services. Stakeholder and public input will help identify critical safety needs and opportunities of the city as a whole and needs of specific neighborhoods and communities.

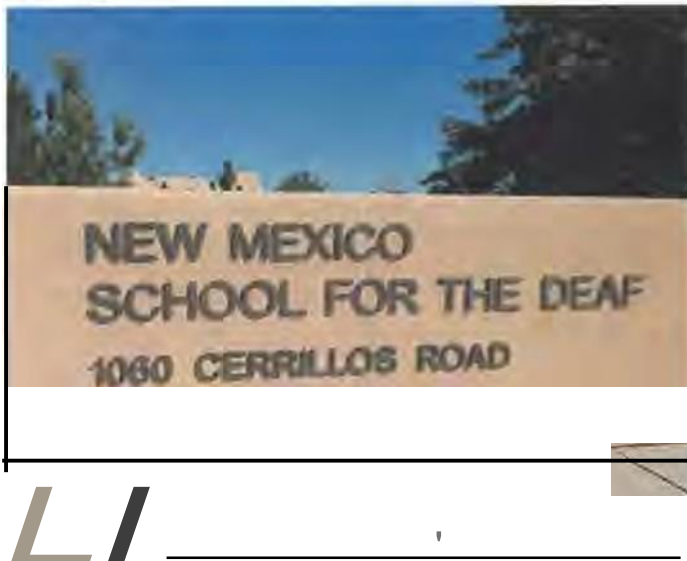
## SCHOOLS

The Santa Fe Public Schools and overall education vision and direction should align with city growth strategies as they are outlined in the Sustainable Growth Management Plan and the General Plan Update. There are also several higher education institutions within the city such as private colleges and universities, public colleges and universities, and community colleges. These higher education offerings and campuses serve as important community resources and hubs but also require partnerships between the city and schools around planning topics such as quality of life, safety, housing, community concerns, and collaboration with community service organizations. Therefore, developing a **Schools section** will be critical to understanding the existing education conditions and trends within the community. The WSP team will complete a desktop review of the Santa Fe Public Schools Facilities Master Plan Update 2021-2026 to

understand recommended capital improvements and findings. For example, the Facilities Master Plan Update includes projections that indicate that excess classrooms will continue to grow over the next ten years.

Student population shifts from the north to the southwest sectors create facility demands in the south. Transfers into the older, northern schools remain high, so the schools are utilized well in the north. Traditional middle schools and high schools are underutilized, while alternative schools continue to show an increase in demand.

In addition to obtaining input from Santa Fe Public Schools, our team will also engage with higher education institutions and other alternative schools such as charter schools. The Santa Fe Public Schools (SFPS) is undertaking a Reimagining SFPS initiative that will also provide insight on important trends to consider when developing recommendations and implementation policies. The initiative has already highlighted several themes such as the need for community schools, the importance of bilingual programs, wellness, the intersection with outdoor learning and cultural programs, and transportation mobility.



## PARKS & RECREATION

A comprehensive **Parks and Recreation section** will link to several General Plan themes and existing conditions such as environmental stewardship and habitat preservation, expansion of biodiversity, arts and culture, equity, sustainable growth and provision of services, community resilience, and the role of open space within future land use and development plans. The City has over 100 existing park facilities and 170 miles of trails. The Parks and Recreation evaluation will be informed by the final Planning Area Boundary for the City's General Plan Update and the recognition that Santa Fe is home to significant landscapes throughout the County that offer a range of recreational opportunities. A desktop review of plans such as the Santa Fe County Open Space, Trails, and Parks Strategic Management Plan (2019), Open Land and Trails Plan (2000), and the Open Space Management Plans will lay the groundwork for an understanding of the existing conditions of the parks and open spaces within the broader Santa Fe region. Understanding the future goals and initiatives within the region will inform the development of the Santa Fe General Plan Update.

Over the past 20 years the Santa Fe Open Space, Trails and Parks Program (OSTP) has moved from acquisition to resource management and providing meaningful experiences for residents within the region. Santa Fe strives to be a national leader in conservation, innovative land management, and the provision of exceptional recreation opportunities. While open space conservation remains a key priority so is the importance of providing access to open spaces, trail connections, educational programming, and context-sensitive and sustainable property management. There is also the recognition that open space, parks, trails, and recreational facilities should reflect the regional needs and user patterns within Santa Fe as they are defined in four management landscapes - El Norte, El Centro, Galisteo, and Estancia.



This understanding will be overlaid with relevant themes from the Santa Fe Sustainability Plan such as enhancing the connectivity of greenbelt and habitat corridors, watersheds and parks, and stormwater management through green infrastructure. Community Plans within Santa Fe County also document goals for open space, trail connections and environmental conservation at the community scale. Several goals and strategies within the Sustainable Growth Management Plan are also linked to parks and recreation such as community-based stewardship, education and outreach related to natural and cultural resource protection, and coordination and partnership with other landowners. Collaboration is a key theme with neighboring Pueblo of Tesuque, Hyde Memorial State Park, and federal land agencies such as the Santa Fe National Forest and the Bureau of Land Management (BLM). Management of shared borders, species, habitats, and recreation impacts is emphasized in the Santa Fe National Forest Plan. The BLM's Resource Management Plan recognizes the need for coordination with Santa Fe on a broader landscape-scale management approach for recreational access and biodiversity since BLM property borders several Santa Fe County Open Space properties. Collectively, these concepts and trends will be outlined in the Parks and Recreation analysis to inform the General Plan Update and provide a comprehensive and balanced approach to recreational needs and opportunities, future land development and landscape conservation.

## HOUSING

LCG prepares analyses to support community housing elements as part of general and comprehensive plans for communities across the U.S. More recently, in response to the housing affordability crisis, this work has expanded to include housing action plans, which expand upon the assessment of existing conditions and needs to include strategies to encourage housing production, a broader diversity of housing types, and affordability that better matches the incomes of area residents and workers.

As part of this task, LCG will complete the following:

- Analyze population and employment trends, with documentation of projections.
- Quantify existing and projected housing needs for all income levels, including extremely low-income households, with documentation of housing and household characteristics, and cost-burdened households.

Collect data on type, size, cost, and age of housing in the city. Collect data on rental properties (e.g., type, size, cost, and age) and percentage of housing stock.

- Review and evaluate the current housing element and other policies regarding housing, including an evaluation of success in attaining planned housing types and units, achievement of goals and policies, and implementation of the schedule of programs and actions.  
Review the effectiveness of current programs, development regulations and permitting processes related to housing development.
- Review land capacity analysis and ability of existing zoning to provide for housing needs and all income brackets.
- Identify areas that may be at higher risk of displacement from market forces.
- Conduct research and assemble findings following the most current New Mexico legislative policies related to housing.

## ECONOMIC DEVELOPMENT ASSESSMENT

Our partner, LCG, understands development economics and the market realities of economic prosperity. Whether operating at the citywide level or addressing downtown Santa Fe or a specific neighborhood, we will ensure that goals and policies pertaining to housing and economic development are implementable and feasible. Our analysis will specifically address issues that are relevant to Santa Fe given its role as a state capital and tourist destination.



These issues include:

- Preserving and enhancing Santa Fe's cultural authenticity while capturing economic opportunities to provide family wage jobs to its residents;
- Enhancing and sustaining the downtown as a community amenity and economic driver;
- Nimblely navigating rapidly changing economic trends in ecommerce and industrial development to maximize job and investment opportunities; Understanding the role that affordable housing plays in maintaining an economically competitive city; and
- Other issues and strategies that emerge from the community visioning process.

As with the population and demographic trends analysis completed earlier, we will prepare a thorough baseline data set that tells the story of Santa Fe's current economy, where it has been, and

where its future opportunities lie. This work will include a detailed assessment of:

- Employment trends;
- Major industries and employers;
- Key opportunities for job creation and growth;
- Key indicators such as education, wages, unemployment, industry clusters, and other data points; and
- Emerging trends that impact economic vitality such as the rise of ecommerce, demand for warehousing and distribution, work-from-home impacts on office demand, and the role that housing unaffordability plays on business recruitment and success.

## ENVIRONMENT STEWARDSHIP/ NATURAL RESOURCES

Santa Fe's General Plan developed in 1999 supports the overall message of Natural Resource Conservation of the time, however, in 2023 these ideas have evolved and grown. The City of Santa Fe is an environmentally friendly community, and it is imperative that the city is prepared to adapt to the protection and conservation of biological and natural resources, visual resources, natural landscapes, and landmarks. Doing so will aid the City of Santa Fe to be more environmentally conservative and conscious. Biological and habitat conservation has grown, with our ever-evolving world, to include permitting, management, and mitigation of natural resources, clean waters, visual and sound responses, threatened and endangered species, air quality, and how the public is responding to these changing challenges.

A review of existing natural resource management, conservation policies and plans identified by the City of Santa Fe (quality of life and sustainable growth) will provide WSP with a solid base of the community's ideas and initiatives to expand the growth of environmental stewardship and natural resources management.

A review of the existing general plan, existing natural resources management, and conservation policies will allow WSP to advance a new City of Santa Fe General Plan that is constructed around the habitat and biological communities within Santa Fe. The new plan will allow Santa Fe to lessen their development impacts to biological and cultural resources.



This section of the Assessment Report will be a comprehensive review and assessment of the city's environmental community that will provide a baseline of information on existing natural resources habitats, communities, wetlands, land use and use those concepts to create a centralized general plan with the modern practices and policies. The Report will also provide specific data analysis and recommendations that are fiscally responsible and immediately implementable.

**SMART CITY VALUE-ADD**

**WSP's Smart City technology team will participate in city planning charrettes and lead all technology and data-driven conversations to help WSP's understanding of existing conditions.** This helps us to develop future integration opportunities which enhance resident experiences and operational efficiencies for the City.

The goal of these charrettes is to understand current operations, dataflows, ownership of data, identification of operational data, process pain points, shortcomings of data management/ collection, and future goals for data sharing, integrations, and information access.

For the Assessment Report, WSP's Smart City Team aims to clearly outline, through charrette outcomes, the opportunity data presents to the City. Outcomes dependent, we expect to present the City's desired improvements in data quality and the potential information sharing practices have for the City in terms of automation efficiencies.

This will begin with a distillation of charrette results and a review of existing documentation, including select City plans listed in the RFP. Further to the workshops, the WSP Smart City Team will request the following documents in its review of City documentation as well: City Data Management Policies, IT infrastructure documentation, cybersecurity policies, smart city initiatives, and the City network architecture, if these exist. **Altogether, the charrettes and documentation review will provide a foundational understanding into workflows, challenges, and needs.**

Based on this understanding, *our* team will summarize the data collection methods and information sharing landscape to outline the specific strengths and opportunities in the existing City organization. By further delving into data security measures required for compliance and ongoing smart city initiatives, the assessment will capture a holistic picture of the City's current technological and operational state.

This summary will become an assessment of current gaps in data collection practices, information sharing protocols, and the level of automation in department workflows. The gap analysis will identify areas requiring improvement, setting the stage for strategic recommendations aligned with the City's overarching goals in modernizing its General Plan Update.

Importantly, the Assessment Report will begin to answer the pivotal question posed by the City: **"What's missing & where?"**

Ultimately, the Assessment Report serves as a valuable guide for targeted enhancements across the City's data sharing and information access landscape.

**MUNICIPAL INFRASTRUCTURE & ASSETS**

WSP showcases its proficiency in municipal infrastructure through a comprehensive approach to asset management programs. In response to the evolving demands on urban infrastructure in rapidly growing cities, we collaborate with municipal agencies to conduct thorough asset management maturity assessments and formulate strategic directions for enhancing their asset management programs.



WSP's capabilities extend to the development of maturity assessment reports, synthesizing key findings and proposing improvement actions based on stakeholder consultations. The firm plays a pivotal role in crafting asset management improvement roadmaps, outlining high-priority initiatives for implementation over the short and long term. These roadmaps include detailed work plans for prioritized initiatives and overarching schedules for their phased implementation.

A significant aspect of our expertise lies in establishing Strategic Asset Management Plans, providing clear guidance for municipal agencies, and steering the evolution of their asset management programs. Additionally, our team facilitates strategy and visioning sessions, fostering discussions on

current asset management drivers, defining goals and objectives, and delineating long-term desired outcomes.

The outcomes and benefits of our collaborations are transformative. They lead to a cohesive understanding of asset management visions, goals, and objectives across organizations, aligning strategic goals with asset management activities. This approach enhances accountability and transparency in decision-making, ensuring the responsible and sustainable allocation of resources.

Our contributions lead to the establishment of clear roles and responsibilities within asset management programs, fostering engagement and ownership of activities, and promoting a culture of collaboration and consistency. The projects contribute to increased consistency in how assets are managed, enabling systematic evaluations of asset conditions and needs.

Our team's expertise in municipal infrastructure shines through its collaborative efforts, demonstrating a commitment to advancing asset management practices, optimizing resource allocation, and fostering a culture of accountability and collaboration for the benefit of urban communities facing rapid growth.

**INSTITUTIONAL STRUCTURES**

The new plan must foster regional collaboration, represent a wide and diverse cross-section of residents and be ready to be implemented to address the challenges the Santa Fe region faces today and may face tomorrow. The updated plan needs to foster collaboration among all of the parties who are under its umbrella - both its regional partners and internal agencies and departments. It should make the region's goals and vision - and the corresponding projects that would flow from those goals and visions - so clear, understandable, and actionable that Santa Fe will become a stronger candidate for many of the discretionary federal funding programs that are flowing from the recently passed infrastructure and climate bills.

However, a plan is really just paper on the shelf unless the parties responsible for making it a reality have agreed to the overarching goals; a clear

delineation of roles and responsibilities; and there is agreement about how decisions will be made. We know that Santa Fe is looking for a plan that can- in practical and real-world terms - address the community's challenges. Therefore, we believe that it is essential to develop buy-in and get the processes right on the front-end - it is better to take the time to define goals and objectives so there is clear understanding of where the process needs to go than to start searching for solutions that do not necessarily meet the ultimate goals of the city. We look forward to working with Santa Fe and its partners and stakeholders on a process that guides the development of the General Plan update and improves collaboration and decision making among the regional entities who are crucial to the city's success and within the internal agencies and departments who are responsible for the development and delivery of the city's plans and programs.

First, the key regional players and stakeholders must be brought together to agree upon a shared vision and goals that will inform their collaborative regional approach to problems. Solutions rarely end at convenient political boundaries, and we need to ensure that the region is working in a unified manner to set goals and priorities. As part of the process, we could also explore current decision-making structures and recommend improvements or enhancements as appropriate. We will work with the Santa Fe Project Manager to identify the key stakeholders, but recognize that this should include local, regional, state, and federal agencies who are essential to delivering funding and projects.

Second, it is also essential that all relevant Santa Fe agencies and departments are also working from a common understanding to ensure that the vision is at the forefront and remains implementable and actionable. There are various key departments, such as Public Utilities, Public Works, Community and Economic Development, and Community Health and Safety that have a role in determining which projects can and should move forward in the city. We want to work with the departments to make sure that from a capital planning and programming perspective, there is a common agreement with and appreciation of the goals of the process, so that everyone understands

the direction that the city wants to go in and decisions are made through that lens.

Third, developing a governance model is not just an end-product to be used, there needs to be a process to manage the actual preparation of the update to the General Plan.

- How will decisions be made?
- How will competing interests be prioritized? How will voices be heard and decisions be made?

As part of the process, we will partner with Santa Fe to ensure an inclusive process that delivers an updated General Plan that meets the goals of the community and can then be acted upon.

## DIGITAL USER PLATFORM

WSP proposes the development of a digital spatial platform to be the main gateway for stakeholders and the public to access mapping related information from the General Plan Update. Additionally, the platform will feature a dedicated engagement section (sometimes referred to as online civic engagement), strategically positioned as the hub for digital interactions related to the Planning Department. This section will facilitate public input, and surveys, fostering a sense of community involvement in the planning process. The integration of interactive tools, such as mapping widgets and comment features, will enable users to provide feedback directly on the platform, ensuring a more inclusive and participatory approach to city planning. The primary objective is to streamline access to key spatial information, enhance communication, and promote transparency.

The heart of this solution lies in the development of a user-friendly online portal that serves as the digital gateway to the General Plan. Leveraging Esri's cutting-edge GIS capabilities our platform will provide an intuitive and visually engaging interface for users to explore the General Plan in a spatial context. Users, including city staff, stakeholders, and the public, will have the ability to navigate through different layers of information, accessing key details related to land use, infrastructure, and socio-economic data.

### **PLATFORM ARCHITECTURE**

The platform will be built using an ArcGIS Hub Site connected to the city's existing ArcGIS Online or Portal instance. This setup will allow the city to share web maps and applications highlighting key aspects of the GPU and other planning related data along with a mechanism to share spatial datasets with stakeholders. Key aspects of the development of the Hub site include the creation of the hub site itself, a web mapping application to view the GPU and other spatial data layers, and a data portal for users to access and download specific data layers from the city. This innovative platform aims to enhance transparency, collaboration, and engagement among staff, stakeholders, and the public, while providing robust backend capabilities for efficient management by the Planning Department. On the backend, our proposed solution includes a robust, ArcGIS Dashboard designed specifically for City staff. This interface will empower staff members to run reports, analyze engagement data, and manage the platform efficiently. The backend system will be equipped with advanced reporting tools, data visualization capabilities, and user management features to streamline administrative tasks and enhance the overall effectiveness of the Planning Department's operations. To achieve this, WSP will undertake key tasks:

### **PRELIMINARY DATA AND SYSTEM ASSESSMENT**

First, an in-depth assessment of the existing system will be conducted to evaluate the current infrastructure, spatial datasets, stakeholder needs, and future goals of the site. Included in this assessment will be determining how existing city datasets will be migrated into the platform at the parcel level. Collaborating closely with the planning department, WSP will gather requirements and define clear goals for the Hub site. The process will involve interviews with planning department staff and benchmarking against industry best practices. Based on the assessment, WSP will gain insights into the department's unique needs.

### **STRATEGIC ROADMAP**

Following the needs assessment, WSP will create a strategic, phased roadmap for the Hub site and

spatial data management within the department. This roadmap will guide the development of key data layers and the Hub site, ensuring that the GIS system is developed in a way that provides lasting value to the city and supports its long-term vision for developing and sharing planning related spatial data, within the budget available for the General Plan Update.

### **DEVELOPMENT OF THE HUB SITE AND MAPPING APPLICATIONS**

Next, the design and development process will commence, ensuring that the site is user-friendly, secure, and efficient. Regular communication with department staff will be key to ensuring development is responsive to evolving needs. By establishing this central portal, both city staff and the public will benefit from improved access to essential information, fostering a more informed and engaged community.

Several of the maps currently available on the city's GIS Services and Products website could be combined into a parcel and zoning application, which would give members of the public a single-stop application for viewing essential property details such as the situs address, Assessor's Parcel Number (APN), assessed value, zoning classification, land use information, planning zone updates, and demographics based on Esri Tapestry Segmentation data. Customized pop-ups will contain links to the city's other information systems, such as tax cards or assessor's databases as appropriate. The aim of this application is to enhance efficiency and improve public interactions with parcel and zoning related data.

### **DATA UPDATE AND LINKING**

The development of a Hub site and primary mapping application are only useful insofar as the underlying data is of high quality and is kept current. To achieve this, several key actions will be taken. First, WSP will review existing workflows to make sure that the data layers feeding the applications are maintained and current. This will be done in a way that minimizes disruptions to the city's existing workflows by automating data transfers or data enrichment as much as possible.

Second, integrating data from different sources is crucial for maintaining consistency. WSP will design

mechanisms to synchronize parcel and zoning data seamlessly. For example, when a property undergoes rezoning, the app will reflect this change promptly within the attributes of the parcel data and/or web application popups related to a given parcel. Similarly, any modifications to parcel boundaries or land use classifications will be synchronized across relevant systems to the extent feasible,

Third, quality assurance measures will be implemented to validate the accuracy of updated data. This includes cross-referencing information with official records, conducting spot checks, and flagging discrepancies promptly. The goal is to provide reliable data to city staff, developers, and the public, ensuring informed decision-making.

Finally, WSP will explore opportunities to link related datasets beyond parcel and zoning data. For instance, integrating property tax records with parcel information can enhance financial planning and revenue forecasting. Similarly, connecting zoning data with environmental factors (e.g., flood zones, soil quality) can inform land use decisions. By prioritizing data accuracy, synchronization, and integration, WSP aims to create a robust foundation for future applications and informed urban planning within the City of Santa Fe.

#### **EXPAND FOR ADDITIONAL APPS IN THE FUTURE**

WSP recognizes the need for scalability and adaptability in the City of Santa Fe's digital infrastructure. To prepare for future applications, WSP proposes that the Hub site be designed with flexibility in mind. Its architecture will allow for seamless integration of new mapping applications and features. By utilizing an ArcGIS Hub site and the city's existing ArcGIS Online and/or Portal instances the site can accommodate diverse functionalities without locking the City into the use of custom applications. Additional applications or sections of the Hub site can be introduced as needed to expand functionality and address new audiences. By adopting these principles, WSP aims to create a future-ready digital ecosystem that supports the City of Santa Fe's growth and enhances public services. By combining Esri technology with a user-centric design and comprehensive backend functionality,

our proposed digital platform is poised to elevate the city's planning process, making it more accessible, engaging, and efficient for all stakeholders involved.

#### **PUBLIC ENGAGEMENT PLAN**

From our staff's participation in community organizations to our planning and design work, WSP has built strong connections with small businesses and community relationships over the many years we have worked in and around Santa Fe.

Our team's approach seeks to incorporate community voices throughout the planning process to develop a vision that strives for equitable and sustainable policy choices that result in a vibrant and vital future for Santa Fe. As a local firm and with our communications and public involvement lead living and working in nearby Albuquerque, WSP is deeply invested in New Mexico communities, including Santa Fe and its diverse neighborhoods. Our team's approach is Inclusive, imaginative, interactive, and centered on building relationships with community partners (CBOs). Our approach focuses on forming neighborhood-specific engagement efforts to put community first and elevate the voices of those historically underserved or excluded from planning processes. To truly co-create a general plan with the community, we will complete the following steps, which are further defined in the subtasks that follow:

- Prepare a Public Engagement Plan and equity strategy that outlines open, transparent, and multi-path communication to engage equity-priority communities, key interested parties, and the broader community.
- Include equity throughout the process by working with the community to develop an equity analysis. Establishing equity goals will help guide the planning process and support equitable outcomes.
- Form a network of compensated Community Partners to lead neighborhood-specific engagement approaches.
- Develop a project-specific brand identity and communications materials, including creating a Social Pinpoint Hub to advance the City's engagement efforts.
- Engage the broader community through

visioning workshops, events, and community conversations.

- Prepare a community engagement and involvement/lessons learned summary and accountability matrix that captures all comments, evaluations, lessons learned, and input throughout the process. This will contribute to the City's future efforts and support long-term capacity building.

## COMMUNITY PARTNERS

A key aspect of our engagement approach is developing relationships with Community Partners to provide consistent and meaningful input through all stages of the planning process. To identify the Community Partners, we will focus on the neighborhoods and districts identified and outlined in Step 1. Community Partners will be considered based on an examination of the existing neighborhood associations and networks, community-based organizations operating on the ground, potential growth areas, and the need to include voices that have historically been excluded from planning processes. We anticipate approximately ten to fifteen Community Partners being identified to help the project team better pinpoint distinct community characteristics and challenges from a grassroots level. Working with Community Partners who understand the Santa Fe tradition and historical and current challenges of neighborhoods will aid in recruiting members, including equity representatives, to participate.

Community Partners will be selected and compensated (compensation to be determined based on PEP and is funded separately of this project budget) based on their relationships and ability to represent and engage equity-priority communities and elevate their voices. The Community Partner selection process and compensation plan will be defined with the City at Project Kickoff in Step 1.



With the support of the public engagement team lead, the Community Partners will be responsible for leading outreach meetings or events, framed as "Community Conversations," in each of the neighborhoods. The Community Partners will help ensure communication materials are written in layperson's terms, use language and graphical communication appropriate to the audience, and meet the City's standards.

With the help of the Community Partners, we will seek perspectives that represent diverse interests and groups such as:

- Modes of transportation (pedestrian, ADA interests, bicycle, public transit, freight, automobile)
- BIPOC communities and businesses
- Social justice
  - Neighborhood associations
  - Economic development
- Arts and culture
- Urban design
- Environmental quality
- Housing groups and organizations
- Youth, LGBTQ+, and elder perspectives
- Accessibility and disability inclusivity

## INTEGRATING EQUITY

To enhance our approach to existing conditions, the equity team will identify equity focused communities in Santa Fe and assess their baseline, the distance between their baseline and vision, and the priorities of their vision. We understand that equity communities often experience underrepresentation, underinvestment, being overburdened, and less resiliency to neighborhood change, and the legacy impacts of these experiences may lead to a different baseline, vision, and priorities than greater Santa Fe. We also recognize the value of culture, economic contributions, diversity of thought, and other characteristics that define equity communities beyond disparities or disadvantages. First, we will review local resources provided by City Staff and conduct our own research to produce an equity analysis that identifies equity communities. This includes a quantitative element like data indicators, using tools like USDOT Transit Disadvantaged

Communities and the Climate and Economic Justice Screening, and a qualitative element that summarizes local historical context that contributed to existing conditions, and public input on their lived experiences with current infrastructure, and related programs, and policies.

The equity team will collaborate with the public engagement team to leverage the equity analysis and the requested Neighborhoods and Districts Map to inform a neighborhood-level public engagement plan. Neighborhood-level public engagement will capture insight specifically from equity communities to develop a Neighborhood Equitable Vision & Needs Assessment. Inclusive public engagement and meeting people where they are will allow us to empower and amplify diverse voices, including the Asian, Black, Hispanic, Spanish, and Native communities, as well as Santa Fe's thriving arts community. The assessment will address key areas of quality of life including housing, economic development, transportation, public safety, parks and recreation, and other themes consistent with the broader existing conditions work. The input will be organized into near, mid, and long-term goals so the City can plan for quick wins and long-term commitments that will build public trust.

Based on community conversations and our own research, the equity team will develop a community assets map layer that can be overlaid on the Neighborhoods and Districts Map. Community assets can include places of worship, green spaces, community centers, public art, libraries, health care facilities, and more that offer sense of belonging, livability, and comfort. Mapping community assets can identify places and spaces to preserve and show gaps in these offerings in some neighborhoods compared to others. The City can use this data to support development without displacement, create connected infrastructure leveraging existing nodes, and prioritize funding.

The equity team will play an advisory role in public engagement. For example, the equity analysis will

allow us to set a goal for representative participation in public engagement based on the diversity in the Santa Fe. This will help set a success metric beyond the volume of engagement efforts. The equity team will make recommendations of community leaders and organizations that represent equity communities and guide the structure for their compensation. They will also coordinate with the technical team on what content to share with the community, a format for that content that is equitably understood, and follow-up post-event to ensure input is used in refinement and decision-making.

Building an equitable, comprehensive plan requires more than just looking at maps and data. To truly plan for an equitable future, we need to understand the history and experiences of the people who live, work, and play in each of Santa Fe's neighborhoods. Effective coordination between technical team members and inclusive communication strategies, and frequent input and review from WSP's embedded equity experts will coordinate timing of inputs, balancing of opinions and development of equitable policies that will inform our planning team's work. This collaborative work will advise project staff on community priorities and identify areas of improvement such as inclusive playgrounds, disadvantaged business opportunities, or affordable housing.

Specific efforts that WSP will include to integrate equity include:

- Advising on Community Partners to engage from equity communities, ensuring inclusion of populations of people of color (e.g., Asian, Black, Hispanic, Spanish, and Native/Indigenous communities)
- Provide content for community input (equity goals, equity analysis map, equity community asset map, etc.)
- Coordinate with the public engagement team on deliberate outreach to develop the Equity Community Needs Assessment.



## ENGAGEMENT TOOLS

During preparation of the Public Engagement Plan, WSP will work with the City to identify communications and engagement strategies and tools that clearly communicate the project goals, relay technical information, and provide opportunities to meaningfully influence the process, analysis, and recommendations. WSP will work with the City to determine the specific outreach activities that are needed at each project milestone in coordination with the technical work. At a minimum, we recommend the following:

- WSP will establish a multi-disciplinary, interactive platform through Social Pinpoint that will act as the public engagement hub for the project. This Social Pinpoint Hub will include opportunities for community members to provide input, stay up to date on the project, and team members to communicate project information in a graphically articulate way.
- Preparation of Community Conversation Kits that Community Partners can use to facilitate discussions, use at community events, or distribute while traveling around town or riding transit. These Kits may include project factsheets, key questions and answers, and instructions on how to facilitate the collection of valuable feedback at places people already frequent.

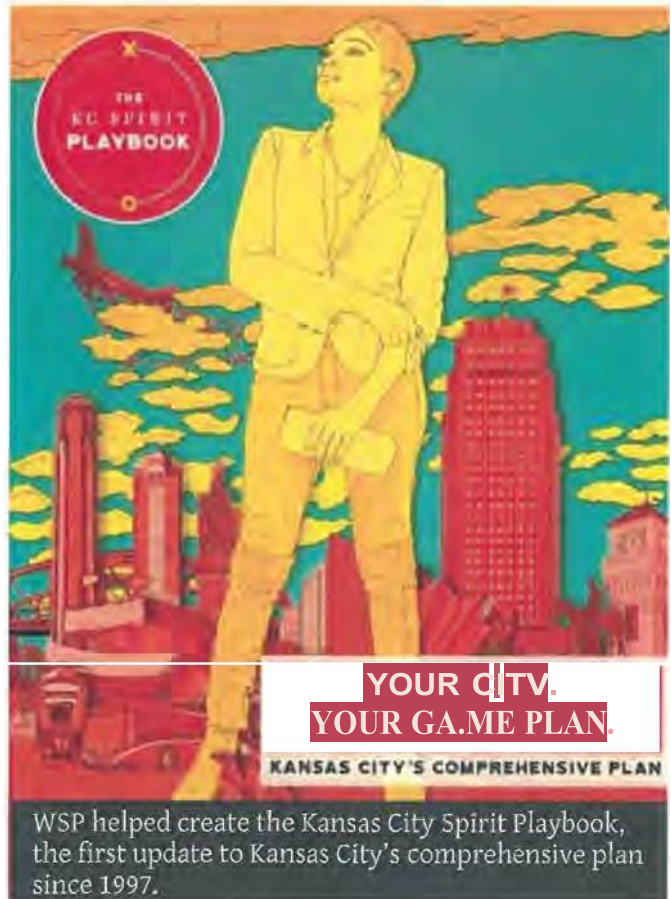
Understanding that not everyone can attend a public meeting or receive a letter in the mail, we will work with our Community Partners to account for the needs of various interested parties and apply area appropriate methods to obtain community input on aspects of the planning process.

- Visioning workshops and openhouses, an interactive idea board through the Social Pinpoint Hub, and project team tables at existing City and community events to inform the overall community vision and vision statements for each comprehensive plan element.

- Surveys and polls to gather feedback about specific topics as identified by the project team and City staff.

## PROJECT MATERIALS & BRAND IDENTITY

WSP will create a project brand and messaging that will be used throughout the project to provide a consistent graphic identity on all publicly distributed materials including the Social Pinpoint Hub, Community Conversation Kits, notices of events and meetings, and other materials that will promote the project, inform the community, and build consensus. All outreach materials will meet City of Santa Fe standards and will be developed in accordance with the City's Public Engagement Guide. All outreach materials will also be ADA-accessible, use better practices for design and graphical communication, and be made available in both English and Spanish. Other language needs may be identified through the Public Engagement Plan process.



|  | General Community   | Equity-focused Communities (EFC)  | Organized Stakeholders Partners   | Decision-makers   |
|--|---|---|---|---|
| <b>STEP 1</b><br>Mobilization and Understanding                              | <ul style="list-style-type: none"> <li>Open house on Assessment guiding themes and findings</li> </ul>        | <ul style="list-style-type: none"> <li>City staff engagement</li> <li>EFC led conversations</li> <li>Stipend community partners support</li> </ul>        | <ul style="list-style-type: none"> <li>City staff engagement</li> </ul> | <ul style="list-style-type: none"> <li>Technical Advisory Committee</li> <li>Introduction to the team and work program</li> <li>Stage gate <u>readiness</u> review</li> </ul> |
| <b>STEP 2</b><br>Vision and Goals  | <ul style="list-style-type: none"> <li>Open house on vision and goals</li> </ul>                              | <ul style="list-style-type: none"> <li>City staff engagement</li> <li>EFC led conversations</li> <li>Stipend community partners <u>support</u></li> </ul> | <ul style="list-style-type: none"> <li>City staff engagement</li> </ul> | <ul style="list-style-type: none"> <li>Technical Advisory Committee</li> <li>Stage gate readiness review</li> </ul>   |
| <b>STEP 3</b><br>Scenario Planning   | <ul style="list-style-type: none"> <li>Open house on scenarios</li> </ul>                                     | <ul style="list-style-type: none"> <li>City staff engagement</li> <li>EFC led conversations</li> <li>Stipend community partners <u>support</u></li> </ul> | <ul style="list-style-type: none"> <li>City staff engagement</li> </ul> | <ul style="list-style-type: none"> <li>Technical Advisory Committee</li> <li>Stage gate readiness review</li> </ul>   |
| <b>STEP 4</b><br>Development of Preferred Plan                               | <ul style="list-style-type: none"> <li>Open house on draft General Plan</li> </ul>                            | <ul style="list-style-type: none"> <li>City staff engagement</li> <li>EFC led conversations</li> <li>Stipend community partners <u>support</u></li> </ul> | <ul style="list-style-type: none"> <li>City staff engagement</li> </ul> | <ul style="list-style-type: none"> <li>Technical Advisory Committee</li> <li>Stage gate readiness review</li> </ul>   |
| <b>STEP 5</b><br>Work Program and Funding Plan                               | <ul style="list-style-type: none"> <li>Open house on work program and funding plan</li> </ul>                 | <ul style="list-style-type: none"> <li>City staff engagement</li> <li>EFC led conversations</li> <li>Stipend community partners support</li> </ul>        | <ul style="list-style-type: none"> <li>City staff engagement</li> </ul> | <ul style="list-style-type: none"> <li>Technical Advisory Committee</li> <li>Stage gate readiness review</li> </ul>   |
| <b>STEP FORWARD</b><br>Governing Body Action + Implementation and Evaluation | <ul style="list-style-type: none"> <li>Regular communication</li> <li>Online civic engagement tool</li> </ul> | <ul style="list-style-type: none"> <li>City staff engagement</li> <li>EFC led conversations</li> <li>Stipend community partners <u>support</u></li> </ul> | <ul style="list-style-type: none"> <li>City staff engagement</li> </ul> | <ul style="list-style-type: none"> <li>Technical Advisory Committee</li> <li>Stage gate readiness review</li> </ul>   |

### LISTENING, LEARNING, & REPORTING BACK

The feedback received throughout the public engagement process will be tracked by the project team in an Accountability Matrix, which will be used over the course of the project to record decisions and actions taken to address feedback, if any. The community feedback will be used in the reporting and analysis of key project documents as identified throughout the project lifecycle. All engagement activities will also be tracked and at the end of the project, an engagement summary, with insights and lessons learned, will be finalized. The Accountability Matrix will be included in the engagement summary to ensure transparency and accountability of the project team, and to help inform the City's future engagement efforts. Engagement findings will be incorporated into Task 5 efforts to ensure thorough and comprehensive communication of the community's vision and short- and long-term needs.

#### Deliverables:

- Kickoff meeting materials
- Project management plan
- Project SharePoint site

- Digital User Platform Strategic Roadmap: Launch Phase
- Social Pinpoint Hub or other online civic engagement tool
- Project communications brand, identity, supporting materials, and templates
- Public Engagement Plan, inclusive of CHART and Midtown outreach considerations
- Open house plans and materials, Community Conversation Kits, and other supporting public engagement materials in English and Spanish, per Table 3
- Governance model
- Administrative draft, public review draft and final assessment report completed in two phases
  - **Phase 1** will document the analysis of existing conditions and trends. The draft report will be published on the project website for public comments and recommendations
  - **Phase 2** will incorporate the public engagement findings and the City's short-term and long-term needs and desires



## STEP 2: VISION AND GOALS

### COMPLETE STREETS OR COMPLETE CORRIDORS?

Which is right for Santa Fe? Is the answer guided by context or feasibility? What can be accomplished in the short, medium, and long term? **These questions make citywide planning fun, exciting, and meaningful.**

With the benefit of a common baseline of understanding, the work begins to develop a vision for Santa Fe and goals to attain in realizing the vision. A vision is a high-level narrative and graphic communication of a future desired state. It should be brief, akin to a brochure. Goals are aspirational statements that guide the development of policies and implementation actions. The vision and goals will also be used to compare and evaluate the scenarios in Step 3. Conciseness is important to ensure that the General Plan is digestible and implementable. General Plans that represent lengthy wish lists are unwieldy to administer and sit on the shelf.

WSP will reference the General Plan Update Initiation Governing Body Resolution, the Assessment Report from Step 1 and the internal project team charrette to identify initial guiding themes to prepare an administrative draft vision and goals. Conceptual placetype groups will also be prepared to support creating an early, structured framework to support developing the vision and goals. A public review draft of the vision and goals will then be deployed pursuant to the Public Engagement Plan. Input from public engagement will then be used to refine and finalize the vision and goals. Planning Commission and Governing Body review will conclude this step as the stage gate prior to beginning Step 3, Scenario Planning.

#### **Deliverables:**

- Public communications and engagement materials per Table 3
- Internal project team charrette to develop vision and goals
- Administrative draft, public review draft and

final vision statement

- Administrative draft, public review draft and final goals
- Placetype initial groups cross referenced to LDC
- Digital User Platform Strategic Roadmap: Phase 2

## STEP 3: SCENARIO PLANNING

### SANTA FE SCENARIOS

*Different Potential Futures for Everyone Today and Tomorrow That Pull Forward an Indigenous Past*

- 1: Corridors of Mobility:** key corridors that could receive new housing and economic diversification to also support complete corridors, increasing ridership and competitiveness for funding robust transit
- 2. Centers of Opportunity:** with Midtown as an initial guide, identifying additional centers throughout the City and exploring refinements to the historic downtown area
- 3: Restoration for Resiliency:** emphasizing existing and degraded or lost natural systems to guide a resiliency framework, deepening the City's connection to nature for a sustainable and resilient future

Could these be the scenarios? Will the preferred plan be one scenario or a mix of all three? The process of technical study and engagement will ultimately guide the appropriate scenarios to create, develop, study, engage and select a preferred future.

Understanding different potential futures and the tradeoffs between those means that each scenario would emphasize different themes while maintaining fidelity to the vision and goals. Each concept is assessed against the project principles to provide a basis for evaluation and comparison.

CHART was and remains a highly important moment in the City's long history. The General Plan Update will be informed by outcomes of CHART. The University of New Mexico Indigenous Design and Planning Institute is a potential academic resource to tap for this project. While the Spanish Laws of

theIndies is well known for influencing the design of Santa Fe, what is less known is the influence of local indigenous populations on Santa Fe before the Spanish period Understanding and incorporating indigenous cultural influence on urban design represents a tremendous opportunity to uncover repressed history and further Santa Feas ***the City Different***.

For the internal project team charrette, WSP will identify six thematic scenarios described in brief narrative form to facilitate discussion. As a standalone document, WSP will develop the initial higher order groups of placetypes. The WSP team will then develop three conceptual, thematic scenarios with placetypes applied to illustrate graphically and narratively a description of each scenario. WSP will also quantitatively and qualitatively characterize the scenarios again (vision, goals, and assessment report) along with public input. Modeling is possible as a separate, optional task, which can be developed, should the process suggest a particular modeling exercise be needed.

As transportation and land-use planning become more and more complex, the need for better planning tools grows. Communities, stakeholders and decision-makers are demanding robust analysis these days. System dynamics helps teams organize *complex* trends and better understand their interrelationships. We see many transportation agencies immediately jump to travel demand modelling (TOM) for the right answers, and unfortunately it rarely works out. TOM is great for understanding car, truck and transit travel patterns based on a fixed set of assumptions, but the quality of those assumptions is key; so, there must first be greater understanding and consensus around the assumptions that become input for the models.

The WSP Scenario Planning Toolbox enables decision-makers to test how different assumptions can impact cities and places around the world. The interactive system dynamics analysis tool, which can be adapted to local and regional conditions, allows multidisciplinary teams to collaborate on the interrelationships of trends for improved understanding, consensus- building and decision-making in the development scenarios.

***Deliverables:***

- Public communications and engagement materials per Table 3
- Scenario planning internal project team charrette
- Placetype categories within each group identified in Step Z coordinated with LDC
- Six discussion draft scenario ideas for internal project team charrette
- Three thematic, conceptual level scenarios with one-page briefer for each with characterization and comparative analysis: administrative review, public draft review and final
- Digital User Platform Strategic Roadmap: Phase 3

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**SMART CITY VALUE-ADD**

**The Smart City Team will aid the overall WSP team in development of Growth Scenarios for future land use and development patterns.**

Primarily, the WSP Smart City team's effort will be in development of telecommunications connectivity plans and technology integration strategies which accommodate each growth scenario. Benefits of such smart city connectivity strategies and technologies are, for example, easier district management despite the complexity inherent to growth.

The Smart City team will first assess what cutting-edge technologies and telecommunications infrastructure will be necessary to support each scenario. In terms of connectivity technologies, the team will explore shared connectivity means to ensure a reliable and high-speed data transmission infrastructure with clear return on investment or linked to enabling outcomes. This may involve recommending the upgrade of existing connectivity infrastructure to support the increased data loads expected. The team may provide a recommendation for SG supporting infrastructure as well to enable faster data transfer rates, support emerging technologies, enable mobility, and include IoT.



**These forward-looking approaches will ensure that the City's connectivity plans are not only robust for the present but also prepared for the demands of future technology advancements and development growth.**

The team will include relevant insights from the Assessment Report on the City's current connectivity infrastructure and capabilities. The assessment will include an in-depth analysis of existing network systems, data communication protocols, and the overall capacity to support the anticipated growth. Our team will assess the readiness of the City for smart city applications, particularly the integration of connected sensors which support reporting and KPI tracking of growth scenarios. Example applications include the deployment of advanced sensors for environmental air quality monitoring, traffic management, waste management, footfall traffic, parking enforcement and other essential urban services. **The aim is to create a robust and interconnected technology landscape that can efficiently collect and transmit data to enhance City services and improve overall quality of life within each growth scenario.**

We recognize that Santa Fe is a prominent tourist attraction with visitors both during summer months hiking and exploring arts as well as during winter ski months. The opportunity data collection and connectivity brings is greater access to information for out-of-town visitors (parking availability, road conditions, public amenity availability) as well as operational insights to the City driving improved experiences (addressing faulty traffic signals, clearing snow from the road).

#### STEP 4: DEVELOPMENT OF PREFERRED PLAN

##### SIMPLICITY FOR POWERFUL PRACTICALITY

A focused plan that is readily digestible by many audiences, from the Governing Body to the Planning Commission, to neighborhood leaders and developers, to City staff, will be successful at realizing its vision and achieving its goals.

The General Plan document will intentionally be concise to facilitate ease of understanding and regular reference. The background information that went into informing its development will be placed in separate appendices. The General Plan must be a useful, usable document, not an encyclopedic homework assignment, which is how these important documents are all-too-often prepared.

An initial outline will be developed with the internal project team charrette as the basis for drafting the document; the topics listed in the RFP will be included, although the ordering and language may vary due to the updated process outcomes. Placetypes will also be fully developed, with specific types under each group, which were previously prepared during scenario planning. The placetypes will be closely coordinated with the LDC; it is expected there will be iteration between each. The framework for the natural, built, social, cultural and economic structure of the City to preserve, enhance and grow Santa Fe in a resilient, sustainable and equitable manner will be developed in narrative, map and graphic form in this step.

##### Deliverables:

- Administrative draft, public review draft and final General Plan document with appendices
- Public communications and engagement materials per Table 3
- General Plan document outlining internal project team charrette
- Complete draft of placetypes categories within each group, coordinated with LDC
- Digital User Platform Strategic Roadmap: Phase 4

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#### SMART CITY VALUE-ADD

**For the General Plan document, the Smart City team will outline the requirements necessary to transition the current development plan to a smart city model.**

From a citizen experience perspective, the team will evaluate how the integration of smart technologies

can enhance daily life to address aspects such as improved public services, increased engagement, safety, and access to information in real-time. Depending on the desires of the City, the team will identify and specify the necessary technology components & systems-e.g., connected sensors, data networks, and IoT Devices-to support the enhanced citizen experience.

The smart city team will strategically apply findings from the Assessment Report to address the identified areas of development in City operations as well. We will identify key insights and pinpoint areas of improvement to define how the City can enhance its information sharing landscape between departments and to its citizens. The team will develop a roadmap in support of these improvements, outlining a step-by-step plan for the phased adoption of related technology solutions.

In essence, the team provides guidance through the General Plan for realizing citizen-centric and operational efficiency through smart technologies by defining the required infrastructure, technology specifications, and commitments necessary to transform the urban model of development.

**STEP 5: WORK PROGRAM AND FUNDING PLAN**

**IF EVERYTHING IS A PRIORITY THEN NOTHING IS**

Being strategic demands setting priorities. The work program must be prioritized so it can be resourced with reasonably foreseeable staff availability, funding, and time. This also enables a programmatic approach to pursuing the generational federal funds available today to support accelerating implementation of the General Plan.

WSP will prepare a prioritized work program and identify potential local, regional, state, and federal funding sources to promote its implementation. The work program will also incorporate an administrative governance policy framework for City staff to use in its daily operations to ensure the General Plan is considered in daily municipal operations and

decision-making, being mindful that New Mexico law provides that the General Plan is an advisory plan.

Prioritization is crucial, as the organizational capacity to undertake the work to implement the General Plan is significant. General Plans that have endless pages of action items get ignored. Simplicity, focus, and prioritization are key.

WSP will produce Equitable Project Development and Delivery Guidelines to empower the City to pull the thread of equity into the fruit the General Plan bears. These project-agnostic guidelines can establish a consistent city-wide approach to project equity, regardless of what departments or champions may lead a project effort. We will also produce a Funding Program Equity Criteria Index, scanning the most relevant federal funding programs and compiling their equity criteria, so if the City is interested in sourcing federal funding directly, projects definitions and approach can be proactively aligned for competitive applications.

**Deliverables:**

- Internal project team charrette to outline the General Plan document
- Public communications and engagement materials per Table 3
- Administrative governance policy and procedure
- Administrative draft, public review draft and final implementation work program
- Equitable project development and delivery guidelines
- Digital User Platform Strategic Roadmap: Phase 5

**STEP FORWARD: GOVERNING BODY ACTION + IMPLEMENTATION AND EVALUATION**

**THE FINISH LINE AND THE STARTING LINE TOGETHER**

All the process, technical work, and engagement, guided by readiness reviews to pass through each stage gate to the next step have led the project to



final hearings for action. Bold yet achievable plans can make it to this milestone with general consensus. But there will still be important fairly debatable decisions for the Governing Body to ultimately make. Once the finish line is crossed, there is no waiting at the starting line to implement the plan and continuously evaluate how it is working—a living document because it was prepared to be used to daily.



WSP will support City staff in preparing for final hearings before the Planning Commission, Governing Body and any other established City advisory body with preparatory meetings and a PowerPoint presentation. WSP will attend the one final hearing each before the Planning Commission and Governing Body. WSP will advise City staff on monitoring and evaluating progress in implementing the updated General Plan after the General Plan Update is adopted to support City staff in building organizational capacity, including supporting staff in standing up a long-range planning division and integrating with the CIP.

***Deliverables:***

- Public communications and engagement materials per Table 3
  - Internal charrette to prepare for final action on General Plan and preparatory implementation steps
  - One decision-maker briefing PowerPoint presentation for City staff to use in briefing decision-makers
  - One Planning Commission hearing and presentation
  - One Governing Body hearing and presentation
- Digital User Platform Strategic Roadmap: Phase 6

**STEP C., ONGOING: ADMINISTRATIVE COORDINATION + ENGAGEMENT AND COMMUNICATION**

Using the project management plan tools developed in Step 1, biweekly team meetings will be held. Additionally, quarterly meetings will be held with the LDC Update team to facilitate information sharing and coordination. Engagement and communication based on the public engagement plan will occur throughout the life of the project.

***Deliverables:***

- Biweekly team agenda and notes
- Quarterly LDC update team agenda and notes
- Monthly e-newsletter
- Periodic social media posts
- PowerPoint presentations for periodic Planning Commission and Governing body updates conducted by City staff, including Step stage gates
- Monthly progress reports and invoices

## 4. DESIRABLE SPECIFICATION

### OUR PROVEN TRACK RECORD

WSP and its teaming partners, Leland Consulting Group and Design Workshop, have a proven track record of preparing General Plans and similar plans. **Please refer to the Organizational Experience section projects and resumes.** Our team's experience goes beyond, as we understand how to support projects from conception to delivery, demonstrating that our experience will make this General Plan implementable and usable daily.

### OUR KNOWLEDGE & PHILOSOPHIES RELATE TO CITY OF SANTA FE'S GOALS

**WSP and its teaming partners have substantial experience working for municipal clients across the country.** Therefore, we understand how municipal governments are structured, administered and engaged by the public, allowing us to effectively manage a complex project like the General Plan. WSP's project manager served three quarters of his career in the public sector across six states, including leading municipal planning departments responsible for General Plans.

### OUR ABILITY TO WORK COLLABORATIVELY

**WSP is already working successfully with the City of Santa Fe, from its support for infrastructure projects to serving as the owner's representative for the Public Works Department on the Midtown project.** WSP recently supported City staff before the Governing Body on the Midtown project. WSP and its team members regularly collaborate with other firms. WSP's project manager has a relationship with principals in both firms extending back over 25 years.

### OUR UNDERSTANDING OF THE CITY OF SANTA FE'S UNIQUE HISTORY & EXPERIENCE WITH SPANISH SPEAKING & MINORITY COMMUNITIES

**Please refer to the Understanding and Approach of the Response to Specifications section of the proposal.** Additionally, the deputy project manager and public engagement lead has working knowledge of Spanish. We regularly engage with Spanish speaking and minority communities. Our approach to engagement includes Spanish language materials, identifying equity focused communities, anticipation of a stipend for community partners so they may effectively participate and a desire to engage with the University of New Mexico Indigenous Design and Planning Institute.

### OUR ALTERNATIVE WORK PLAN THAT SUPPORT CITY OF SANTA FE'S VISION, GOALS, & OBJECTIVES

**WSP has proposed an alternate work plan based on our experience in conducting General Plan Updates and similar planning documents.** The result allows for better integration with the LDC Update, a faster completion from a stepwise, consensus-building approach. Additionally, WSP has proposed a value-add focus on Smart Cities, to support the City of Santa Fe in modernizing and diversifying its economic base. We have also proposed to support local and regional governance for better decision-making and collaboration across these scales.



## S. LOCAL PREFERENCE

### STATE OF NEW MEXICO

TAXATION AND REVENUE DEPARTMENT

## RESIDENT BUSINESS CERTIFICATE

Issued to: **WSP USA INC.**

OBA: **WSP USA INC. •  
1 PENN PLZ 6TH FLOOR  
NEW YORK, NY 10119-0002**

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Expires: **01-Sep-2025**

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Certificate Number:

**L1318621296**



Stephanie Schardin Clarke  
*Cabinet Secretary*

THIS CERTIFICATE IS NOT TRANSFERABLE



**BUSINESS REGISTRATION**

City of Santa Fe  
Treasury Department  
200 Lincoln Ave.  
Santa Fe, New Mexico 87504-0909  
505-955-6551

**Business Name:** WSP USA INC.  
DBA: WSP USA INC.

**Business Location:** 150 WASHINGTON AVE  
SANTA FE, NM 87501

**Owner:** WSP USA INC

**License Number:** 230545

**Issued Date:** August 03, 2023

**Expiration Date:** August 03, 2024

**CRS Number:** 01195458002

**License Type:** Business License - Renewable

**Classification:** Business Registration - Standard

**Fees Paid:** \$35.00

WSPUSA INC.  
2019 W GALISTEO ST UNIT M-1  
SANTA FE, NM 87505

THIS IS NOT A CONSTRUCTION PERMIT OR SIGN PERMIT.  
APPROPRIATE PERMITS MUST BE OBTAINED FROM THE CITY  
OF SANTA FE BUILDING PERMIT DIVISION PRIOR TO  
COMMENCEMENT OF ANY CONSTRUCTION OR THE  
INSTALLATION OF ANY EXTERIOR SIGN.

THIS REGISTRATION/LICENSE IS NOT TRANSFERABLE TO  
OTHER BUSINESSES OR PREMISES.

TO BE POSTED IN A CONSPICUOUS PLACE

## H. OTHER SUPPORTING MATERIAL

Please see the following pages for our signed Non-Collusion Affidavit and Conflict of Interest forms.

**NON-COLLUSION AFFIDAVIT**  
*Complete, Sign and Return with your proposal.*

I hereby affirm that: I am the Senior Vice President (insert title) and the  
duly authorized representative of WSP USA Inc. (insert  
organization's name) whose address is  
2440 Louisiana Blvd NE, Suite 400, Albuquerque, NM 87110 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 Manjeet Ranu

Printed Name Manjeet Ranu

Title Senior Vice President

Date 11/28/2023



## CONFLICT OF INTEREST STATEMENT FOR CONSULTING FIRMS

*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 Principal Planning Consultant 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 Planning Consultant and known key personnel needs to describe the conflict.

The Planning Consultant agrees that, if after award, an organizational conflict of interest is discovered, the Planning Consultant makes an immediate and full written disclosure to the City that includes a description of the action that the Planning Consultant 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 Planning Consultant 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, Manjeet Ranu 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 General Plan Update. For the duration of this firm's involvement in the General Plan Update contract, this firm agrees not to accept any gift, benefit, 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 General Plan Update contract.

I certify that this firm will keep all General Plan Update 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 General Plan Update contract. I understand that if this firm leaves this General Plan Update 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 General Plan Update 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 General Plan Update contract confidential information has or intends to disclose that information in violation of this agreement.

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

Company Name:

WSPUSAinc.

Authorized Representative/Title:

Senior Vice President

Phone Number:

505-881-5357

Fax Number:

NA

Email Address:

Manjeet.Ranu@wsp.com

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

Date:

11/28/2023

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.





WSP USA is the U.S. operating company of WSP, one of the world's leading engineering and professional services firms. Dedicated to serving local communities, we are engineers, planners, technical experts, strategic advisors, and construction management professionals. WSP USA designs lasting solutions in the buildings, transportation, energy, water, and environment markets. With more than 15,500 employees in over 300 offices across the U.S., we partner with our clients to help communities prosper.

WSP USA Inc  
2440 Louisiana Blvd NE  
Suite 400  
Albuquerque, NM 87110

505-881-5357  
[www.wsp.com](http://www.wsp.com)

# Contract Exhibit 3

## CITY OF SANTA FE PLANNING & LAND USE DEPARTMENT

# GENERAL PLAN UPDATE

## *COST PROPOSAL*

RFP #24/20/P

Revised April 22, 2024

EXHIBIT B





*The City Different*



City of Santa General 1:)lan update

**Cost Proposal**

## APPENDIXC COST RESPONSE FORM

Aligned to Alternative Scope of Work

| Description   | Estimated Hours | Cost      |
|---|-----------------|-----------|
| Step 1: Mobilization and Understanding                                      | 2,260           | \$440,000 |
| Step 2: Vision and Goals  | 1,520           | \$280,000 |
| Step 3: Scenario Planning   | 1,140           | \$285,000 |
| Step 4: Development of Preferred Plan                                       | 1,180           | \$295,000 |
| Step 5: Work Program and Funding  | 840             | \$185,000 |
| Step Forward: Governing Body Action +<br>Implementation and Evaluation      | 260             | \$65,000  |
| Step Ongoing: Administrative Coordination +<br>Engagement and Communication | 780             | \$195,000 |

All amounts provided must include all labor, materials, equipment, transportation, configuration, installation, training and profit to provide the goods and/or services described in Section IV.A, (as amended by any current RFP amendments for the period specified).

#### Forecast Cost Per Fiscal Year

|        |           |
|--------|-----------|
| FY2024 | \$50,000  |
| FY2025 | \$748,000 |
| FY2026 | \$658,000 |
| FY2027 | \$289,000 |



EXHIBIT B



WSP USA is the U.S. operating company of WSP, one of the world's leading engineering and professional services firms. Dedicated to serving local communities, we are engineers, planners, technical experts, strategic advisors, and construction management professionals. WSP USA designs lasting solutions in the buildings, transportation, energy, water, and environment markets. With more than 15,500 employees in over 300 offices across the U.S., we partner with our clients to help communities prosper.



# CITY OF SANTA FE PROCUREMENT CHECKLIST



**Contractor Name:** W. S.; S.; P.; U.; Sc.; A. Inc.  
**Procurement/contract Title:** Greenbelt Planning Update  
**Procurement Method/Vehicle:**  Sole Source  State Price Agreement/Existing  D  
 Cooperative f81 Request For Proposals (RFP)  Invitation To Bid (1TB)  Exempt: 13-1-98  
 Small Purchase (Contract Under \$60,000)  Other: \_\_\_\_\_

Requesting Department: Community Development      Staff Name: Heather Lamboy

**Procurement Requirements:**

Procurement files shall be maintained for all purchases and contracts, regardless of the method of procurement. The procurement files shall contain the basis on which the awards are made, all submitted bids/proposals, all evaluation materials (bid tabs or Evaluation Committee Reports), scoresheets, quotations, and all other documentation related to or prepared in conjunction with evaluations, negotiations, and the award processes. The procurements shall contain written determinations from the Requesting Departments, signed by the Chief Procurement Officers (this document), setting forth the reasoning for the contract award decisions before submitting them to the Committees.

**REQUIRED DOCUMENTS FOR APPROVAL BY PURCHASING (CPD)**

| YES                      | N/A                      |  | YES                      | N/A                      |   |
|--------------------------|--------------------------|--|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Written Determination (srvs)   | <input type="checkbox"/> | <input type="checkbox"/> | Quote(s) (3 Valid & Current for Over 20k) |
| <input type="checkbox"/> | <input type="checkbox"/> | RFP • Confidential info to be provided to GB by CPD Buyer  | <input type="checkbox"/> | <input type="checkbox"/> | BAR                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | 1TB (include bid tab)  | <input type="checkbox"/> | <input type="checkbox"/> | FIR                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | Other: _____   | <input type="checkbox"/> | <input type="checkbox"/> | Certificate of Insurance (srvs)           |
| <input type="checkbox"/> | <input type="checkbox"/> | Cooperative Agreements and GSAs and Statewide Price Agreements (include the cover page to show valid date, page, and items to be purchased)  |                          |                          |   |
| <input type="checkbox"/> | <input type="checkbox"/> | Horizon Declination or Screenshot of <a href="http://horizonsofnewmexico.org/services.html">horizonsofnewmexico.org/services.html</a> (srvs) |                          |                          |   |
| <input type="checkbox"/> | <input type="checkbox"/> | Summary of Contract (only on contracts)  |                          |                          |   |
| <input type="checkbox"/> | <input type="checkbox"/> | Current Santa Fe Business Registration (or Exemption if notax)   |                          |                          |   |
| <input type="checkbox"/> | <input type="checkbox"/> | Executed Contract or Price Agreement (legal and contractor must sign before purchasing approves)   |                          |                          |   |
| <input type="checkbox"/> | <input type="checkbox"/> | Chief Procurement Officer (or designee) Approval for Exempt from Procurement (use memo on our site)  |                          |                          |   |
| <input type="checkbox"/> | <input type="checkbox"/> | Evaluation Committee Report (RFPs only)  |                          |                          |   |
| <input type="checkbox"/> | <input type="checkbox"/> | Signed Sole Source Determination, Vendor Written Quote, SS Letter from Contractors, and 30 Days Email  |                          |                          |   |
| <input type="checkbox"/> | <input type="checkbox"/> | >20k = Memo addressed to City Manager (Under 150K) Committees/City Council (Over 150K)   |                          |                          |   |

Assistant Director, Planning & Land Use 5-16-2024

| Department Point of Contact | Title | Date  |
|-----------------------------|-------|-------|
| _____                       | _____ | _____ |
| Department Director         | _____ | _____ |
| _____                       | _____ | _____ |
| Chief Procurement Officer   | _____ | _____ |
| _____                       | _____ | _____ |
| ITT Representative          | _____ | _____ |



# City of Santa Fe

## Summary of Contract, Agreement, Amendment & Lease

All applicable fields to be completed by department (complete 1.b only if you are processing an amendment):

1.a Munis Contract: 3250006 Procurement# (RFP/ITB# If any): 2/20/P

Contractor: WSP USA, Inc.

Procurement Method:  Small Purchase  **RFP/ITB**  /TB  Sole Source  GSA  Cooperative  Exempt  SWPA/Existing

Description/Title: General Plan Update and Digital User Platform

Contract: Agreement: [g] Lease/Rent: [Q] Amendment: [g]  
Term Start Date: When Signed Term End Date: 6/30/2028 Total Contract Amount: \$1,887,871.87

Approved by Council (If over the City Manager's approval threshold, you must go through GB)

Contract /Lease: Contract (Initial Approval)

1.b Amendment #: N / A to the Original Contract/Lease# \_\_\_\_\_

Increase/(Decrease) Amount\$: N / A

Extend Expiration Date to: N / A

Approved by Council (If the original went through GB, all amendments must go through GB regardless of the amendment reason)

Amendment is for: N/A

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

This is an initial contract approval request for the update of the General Plan and creation of a digital user platform.

### 3. Procurement History:

1 Purchasing Officer Review: May 21, 2024 Date:  
Comment & Exceptions: 13-1-112. Competitive sealed proposals; request for proposals.

### 4. Funding Source: General Fund Org / Object: 1004501/510300

11dj, llo1"ira Budget Officer Approval: May 21, 2024 Date:  
Comment & Exceptions: \_\_\_\_\_

### 5. Grant History (if applicable): N/A

Grants Administrator Approval: \_\_\_\_\_ Date: \_\_\_\_\_

Staff Contact who Completed This Form: Heather Lamboy Phone #: 505-470-5281

To be recorded by City Clerk: \_\_\_\_\_ Email: hlamboy@santafenm.gov

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

ITT Representative (attesting that all information is reviewed) \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

WSPUSAINC.  
1 PENN PLZ 6TH FLOOR  
NEW YORK.NY 10119-0002

June 29, 2023  
NM Business Tax ID:  
01-195458-00-2  
LetterID:L0758727280

**STATE OF NEW MEXICO TAXATION AND REVENUE DEPARTMENT  
REGISTRATION CERTIFICATE**

|  |   |   |
|--|---|---|
| Date Issued<br><b>06-Dec-1983</b>                  | IDENTIFICATION NUMBER<br><b>01195458002-GRT</b> | Business Start Date<br><b>06-Dec-1983</b> |
| Business Location<br><b>2440 LOUISIANA BLVD NE</b> | Business End Date                               |   |
| City and State<br><b>ALBUQUERQUE, NM</b>           | Zip Code<br><b>87110-4383</b>                   |   |
| Taxpayer Name<br><b>WSP USA INC.</b>               | Taxpayer Type<br><b>Corporation</b>             |   |
| Firm Name<br><b>WSPUSAINC.</b>                     | Filing Frequency<br><b>Monthly</b>              |   |
| Mailing Address<br><b>4139 OREGON PIKE</b>         | Zip Code<br><b>17522-9550</b>                   |   |
| City and State<br><b>EPHRATA, PA</b>               | Zip Code<br><b>17522-9550</b>                   |   |

This Registration Certificate is Issued pursuant to Section 7-1-12 NMSA 1978 for Gross Receipts, County Gross Receipts, and Municipal Gross Receipts Taxes. This copy must be displayed conspicuously in the place of business. Any purchaser of the registrant's business is subject to certain requirements under Section 7-1-1 NMSA 1978.

Cabinet Secretary

By 

Any Inquiries concerning your Identification Number should be addressed to the Audit & Compliance Division, P.O. Box 630, Santa Fe, New Mexico, 87504-0630

THIS CERTIFICATE IS NOT TRANSFERABLE

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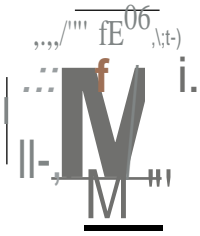
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Form Revised 12/2003

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## City of Santa Fe

Treasury Department  
200 Lincoln Ave.

Santa Fe, New Mexico 87504-0909  
505-955-6551

## BUSINESS REGISTRATION

**Business Name:** WSP USA INC.  
DBA: WSP USA INC.

**Business Location:** 150 WASHINGTON AVE  
SANTA FE, NM 87501

**Owner:** WSP USA INC

**License Number:** 230545

Issued Date: August 03, 2023

**Expiration Date:** August 03, 2024

**CRS Number:** 01195458002

**License Type:** Business License - Renewable

**Classification:** Business Registration - Standard

**Fees Paid:** \$35.00

WSP USA INC.  
2019 W GALISTEO ST UNIT M-1  
SANTA FE, NM 87505 -

THIS IS NOT A CONSTRUCTION PERMIT OR SIGN PERMIT.  
APPROPRIATE PERMITS MUST BE OBTAINED FROM THE CITY  
OF SANTA FE BUILDING PERMIT DIVISION PRIOR TO  
COMMENCEMENT OF ANY CONSTRUCTION OR THE  
INSTALLATION OF ANY EXTERIOR SIGN.

THIS REGISTRATION/LICENSE IS NOT TRANSFERRABLE TO  
OTHER BUSINESSES OR PREMISES.

**TO BE POSTED IN A CONSPICUOUS PLACE**

WSPUSAINC.  
1 PENNPLZ 6TH FLOOR  
NEW YORK, NY 10119-0002

June 29, 2023  
NM Business Tax ID:  
01-195458-00-2  
Letter ID: L0758727280

STATE OF NEW MEXICO TAXATION AND REVENUE DEPARTMENT  
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| Taxpayer Name<br><b>WSP USA INC.</b>               | Taxpayer Type<br><b>Corporation</b>             |   |
| Firm Name<br><b>WSP USA INC.</b>                   | Filing Frequency<br><b>Monthly</b>              |   |
| Mailing Address<br><b>4139 OREGON PIKE</b>         |   |   |
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Form Revised 02/2003

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Cabinet Secretary

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Form Revised 02/2003

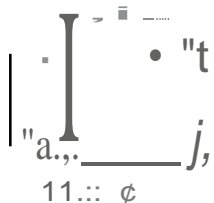
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Cabinet Secretary

By

Any inquiries concerning your Identification Number should be addressed to the Audit & Compliance Division, P.O. Box 630, Santa Fe, New Mexico 87504-0630



## City of Santa Fe

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THIS REGISTRATION/LICENSE IS NOT TRANSFERRABLE TO  
OTHER BUSINESSES OR PREMISES.

**TO BE POSTED IN A CONSPICUOUS PLACE**

CERTIFICATE OF LIABILITY INSURANCE

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.

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

PRODUCER
Arthur J. Gallagher Risk Management Services, LLC
300 Madison Avenue
28th Floor
New York NY10017

CONTACT NAME: AJG\_Service
PHONE: (917) 112-4702
FAX:
E-MAIL: GGB.WSPUS.CertRem.ists@aic.com
INSURER: Liberty Insurance Corporation
INSURER AFFQ ROING COVERAGE:
NAIC#: 42404
INSURER: ERB: Zurich Arneri Insurance Co.
NAIC#: 16535

INSURED
WSP USA Inc.
One Penn Plaza
New York, NY 10119

COVERAGES CERTIFICATE NUMBER: 186310047 REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NO1 WITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

Table with columns: TYPE OF INSURANCE, POLICY NUMBER, POLICY EFFECTIVE DATE, POLICY EXPIRATION DATE, LIMITS. Rows include Commercial General Liability, Automobile Liability, Umbrella Liability, and Workers Compensation.

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

THIRTY (30) DAYS NOTICE OF CANCELLATION.
Opportunity #US-WSP-202304667 Project Description: General Plan Update for the City of Santa Fe, New Mexico.

The City of Santa Fe their officials, officers, employees, and agents are Included as Additional Insured with respect to the General Liability policies as required by written agreement, pursuant to and subject to the policy's terms, definitions, conditions and exclusions.

CERTIFICATE HOLDER
City of Santa Fe
200 Lincoln Ave.
Santa Fe NM 87501

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

CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/00/YYYY)

5/10/2024

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

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

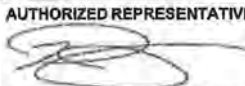
|   |  |  |
|---|--|--|
| <b>PRODUCER</b><br>Arthur J. Gallagher Risk Management Services, LLC<br>300 Madison Avenue, 28th Floor<br>New York NY 10017 | <b>icT ANJ Service Team</b><br>(!)g o :J.fl: 212-994-7020<br>t,4:"Jss: GGB.WSPUS.CertReq_uest@.ejQ.com<br>INSURER(S) AFFORDING COVERAGE<br>INSURER A: QBE Specialty Insurance Comonv<br>INSURERS:<br>INSURERC:<br>INSURER o:<br>INSURERE:<br>INSURERF: | fffc.Hol: 212-994-7074<br>NAICf<br>11515 |
| <b>INSURED</b><br>WSP USA Inc.<br>One Penn Plaza<br>New York, NY 101f9  | WSPGL01  |  |

**COVERAGES**      **CERTIFICATE NUMBER:** 1520264365      **REVISION NUMBER:**

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

| INSURER   | COMMER-CIAL GENERAL LIABILITY | POLICY NUMBER | POLICY EFF | POLICY EXP  | EACH OCCURRENCE LIMITS   |
|---|-------------------------------|---------------|------------|-------------|--|
| CLAIMS-MADE <input type="checkbox"/> OCCUR<br>N'L AGGREGATE LIMIT APPLIES PER:<br>POLICY <i>W-i OLoc</i><br>OTHER:  |                               |               |            |             | DAMAucTO_kcN,"<br>_II S.II;ru:>_2IJJITe_nce \$<br>MED EXP(Any om,pe<1,on) \$<br>PERSONAL & ADVINJURY \$<br>GENERAL AGGREGATE \$<br>PRODUCTS - COMP/OP AGG \$<br>\$ |
| <b>AUTOMOBILE LIABILITY</b><br>ANY AUTO<br>OWNED AUTOS ONLY<br>SCHEDULED AUTOS<br>AUTOS ONLY HIRED<br>AUTOS ONLY NON-OWNED  |                               |               |            |             | CO MBINED SINGLE LIMIT<br>a-accidenll \$<br>BODILY INJURY (Perperson)   \$<br>BODILY INJURY (Peraccident) \$<br>PROPERTY DAMAGE rPeraccidenh \$<br>\$              |
| <b>UMBRELLA LIAS</b><br>EXCESS LIAB <input type="checkbox"/> OCCUR<br>DED RETENTIONS CLAIMS-MADE  |                               |               |            |             | EACH OCCURRENCE \$<br>AGGREGATE \$   |
| <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICE/MEMBER EXCLUDED? (Mandatory r/nH) <input type="checkbox"/> NIA<br>If es, describe under DESCRIPTION OF OPERATIONS below |                               |               |            |             | PER STATUTE  OTH-ER<br>E.L.EACH ACCIDENT \$<br>E.L.DISEASE - EAEMPLOYEE \$<br>E.L.DISEASE • POLICY LIMIT \$  |
| CLAIMS-MADE<br>A Professional Liability   |                               | QPL0022630    | 11/112023  | 110/31/2024 | PerClaim \$2,000,000<br>Aggregate \$2,000,000  |

DESCRIPTION OF OPERATIONS/ LOCATIONS/ VEHICLES (ACORD101, Additional Remarks Schedule, may be attached if more space is required)  
 THIRTY (30) DAYS NOTICE OF CANCELLATION  
 Opportunity #US-WSP-202304667 | Project Description: General Plan Update for the City of Santa Fe, New Mexico.

|  |  |
|--|--|
| <b>CERTIFICATE HOLDER</b><br>City of Santa Fe<br>200 Lincoln Ave.<br>Santa Fe NM 87501 | <b>CANCELLATION</b><br>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.<br>AUTHORIZED REPRESENTATIVE<br> |
|--|--|

# 3-Procurement\_Checklist\_V3\_12.1\_.23\_GPU 5-20-24

Final Audit Report

2024-05-21

|                 |  |
|-----------------|--|
| Created:        | 2024-05-21                                   |
| By:             | JIMMY TAPIA Qptapia@santafenm.gov)           |
| Status:         | Signed                                       |
| Transaction ID: | CBJCHBCAABAHAHDe1AqnRPJ2vX8VjxxpCyrptVco68p2 |

## "3-Procurement\_Checklist\_V3\_12.1\_.23\_GPU 5-20-24" History

Document created by JIMMY TAPIA Optapia@santafenm.gov)

2024-05-21 - 5:35:39 PM GMT-IP address: 63.232.20.2

8 Document emailed to ajhopkins@santafenm.gov ajhopkins@santafenm.gov(ajhopkins@santafenm.gov) for signature

2024-05-21 - 5:44:59 PM GMT

Email viewed by ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov)

2024-05-21 -5:45:53 PM GMT- IP address: 104.47.64.254

Document e-signed by ajhopkins@santafenm.gov ajhopkins@santafenm.gov (ajhopkins@santafenm.gov)

Signature Date: 2024-05-21 - 5:46:26 PM GMT - Time Source: server- IP address: 63.232.20.2

C<sup>1</sup> Document sent to Travis Dutton-Leyda (tkduttonleyda@santafenm.gov) and jlovato@santafenm.gov for signature. One of them to sign

2024-05-21 - 5:46:31 PM GMT

f:l Email viewed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)

2024-05-21 - 5:51:20 PM GMT- IP address: 63.23.2.20.2

& Document e-signed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)

Signature Date: 2024-05-21 - 9:35:12 PM GMT - Time Source: server- IP address: 63.232.20.2

Document emailed to EMILY OSTER (ekoster@santafenm.gov) for signature

2024-05-21 • 9:35:17 PM GMT

i... Email viewed by EMILY OSTER (ekoster@santafenm.gov)

2024-05-21 • 10:07:03 PM GMT- IP address: 104.47.65.254

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

Signature Date: 2024-05-21 -10:14:57 PM GMT- Time Source: server- IP address: 216.207.130.218



0 Agreement completed.

2024-05-21 - 10:14:57 PM GMT



Created by  
**Adobe**  
Acrobat Sign

# 24-0352 WSP USA, Inc

Final Audit Report

2024-05-31

|                 |  |
|-----------------|--|
| Created:        | 2024-05-31                                   |
| By:             | XAVIER VIGIL (xivigil@santafenm.gov)         |
| Status:         | Signed                                       |
| Transaction ID: | CBJCHBCAABAA4FZI9FNOuKMmxHi2txFBn0xVthfyAHae |

## "24-0352 WSP USA, Inc" History

-  Document created by XAVIER VIGIL (xivigil@santafenm.gov)  
2024-05-31 - 8:26:25 PM GMT - IP address: 63.232.20.2
-  Document emailed to Alan Webber (amwebber@santafenm.gov) for signature  
2024-05-31 - 8:31:05 PM GMT
-  Email viewed by Alan Webber (amwebber@santafenm.gov)  
2024-05-31 - 9:45:52 PM GMT - IP address: 172.226.3.28
-  Document e-signed by Alan Webber (amwebber@santafenm.gov)  
Signature Date: 2024-05-31 - 9:46:03 PM GMT - Time Source: server- IP address: 63.232.20.2
-  Document emailed to GERALYN CARDENAS (gfcardenas@santafenm.gov) for signature  
2024-05-31 - 9:46:07 PM GMT
-  Email viewed by GERALYN CARDENAS (gfcardenas@santafenm.gov)  
2024-05-31 - 9:48:15 PM GMT - IP address: 104.47.64.254
-  Document e-signed by GERALYN CARDENAS (gfcardenas@santafenm.gov)  
Signature Date: 2024-05-31 - 9:48:23 PM GMT - Time Source: server- IP address: 63.232.20.2
-  Agreement completed.  
2024-05-31 - 9:48:23 PM GMT



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

5/21/2026

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

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

|   |   |                       |
|---|---|-----------------------|
| <b>PRODUCER</b><br>Arthur J. Gallagher Risk Management Services, LLC<br>300 Madison Avenue<br>28th Floor<br>New York NY 10017 | <b>CONTACT NAME:</b> AJG Service Team     |                       |
|   | <b>PHONE (A/C. No. Ext):</b> 212-994-7020 | <b>FAX (A/C. No):</b> |
| <b>E-MAIL ADDRESS:</b> GGB.WSPUS.CertRequests@ajg.com   |   |                       |
| <b>INSURER(S) AFFORDING COVERAGE</b>  |   | <b>NAIC #</b>         |
| <b>INSURER A:</b> Liberty Insurance Corporation   |   | 42404                 |
| <b>INSURER B:</b> Zurich American Insurance Company   |   | 16535                 |
| <b>INSURER C:</b>   |   |                       |
| <b>INSURER D:</b>   |   |                       |
| <b>INSURER E:</b>   |   |                       |
| <b>INSURER F:</b>   |   |                       |


**COVERAGES** **CERTIFICATE NUMBER:** 501562521 **REVISION NUMBER:**

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

| INSR LTR | TYPE OF INSURANCE  | ADDL INSD | SUBR WVD | POLICY NUMBER                            | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS   |
|----------|--|-----------|----------|--|-------------------------|-------------------------|--|
| B        | <input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b><br><input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR<br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC<br>OTHER: | Y         | Y        | GLO9835819-13                            | 5/1/2026                | 5/1/2027                | EACH OCCURRENCE \$ 3,500,000<br>DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 3,500,000<br>MED EXP (Any one person) \$ 10,000<br>PERSONAL & ADV INJURY \$ 3,500,000<br>GENERAL AGGREGATE \$ 14,000,000<br>PRODUCTS - COMP/OP AGG \$ 7,000,000<br>\$ |
| A        | <input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b><br><input type="checkbox"/> ANY AUTO<br><input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS<br><input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY                                  |           |          | AS7-621-094060-036                       | 5/1/2026                | 5/1/2027                | COMBINED SINGLE LIMIT (Ea accident) \$ 5,000,000<br>BODILY INJURY (Per person) \$<br>BODILY INJURY (Per accident) \$<br>PROPERTY DAMAGE (Per accident) \$<br>\$  |
|          | <input type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR<br><input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE<br>DED RETENTION \$   |           |          |  |                         |                         | EACH OCCURRENCE \$<br>AGGREGATE \$<br>\$   |
| A        | <input checked="" type="checkbox"/> <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below  | Y/N       | N/A      | WA7-62D-094060-016<br>WC7-621-094060-916 | 5/1/2026<br>5/1/2026    | 5/1/2027<br>5/1/2027    | <input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER<br>E.L. EACH ACCIDENT \$ 2,000,000<br>E.L. DISEASE - EA EMPLOYEE \$ 2,000,000<br>E.L. DISEASE - POLICY LIMIT \$ 2,000,000  |

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 THIRTY (30) DAYS NOTICE OF CANCELLATION.  
 Opportunity #US-WSP-202304667 | Project Description: General Plan Update for the City of Santa Fe, New Mexico.

The City of Santa Fe their officials, officers, employees, and agents are included as Additional Insured with respect to the General Liability policy as required by written agreement, pursuant to and subject to the policy's terms, definitions, conditions and exclusions. The coverage provided by the General Liability policy is primary and any other coverage shall be excess only, not contributing. Waiver of Subrogation applies to Additional Insured with respect to the General Liability policy as required by written agreement, pursuant to and subject to the policy's terms, definitions, conditions and exclusions.

|  |  |
|--|--|
| <b>CERTIFICATE HOLDER</b><br><br>City of Santa Fe<br>200 Lincoln Ave.<br>Santa Fe NM 87501 | <b>CANCELLATION</b><br><br>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.<br><br>AUTHORIZED REPRESENTATIVE<br> |
|--|--|

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# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/27/2025

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

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


|   |   |                       |
|---|---|-----------------------|
| <b>PRODUCER</b><br>Arthur J. Gallagher Risk Management Services, LLC<br>300 Madison Ave 28th Floor<br>New York NY 10017 | <b>CONTACT NAME:</b> AJG Service Team     |                       |
|   | <b>PHONE (A/C. No. Ext):</b> 212-994-7020 | <b>FAX (A/C. No):</b> |
| <b>E-MAIL ADDRESS:</b> ggb.wspus.certrequests@ajg.com   |   |                       |
| <b>INSURER(S) AFFORDING COVERAGE</b>  |   | <b>NAIC #</b>         |
| <b>INSURER A:</b> QBE Specialty Insurance Company   |   | 11515                 |
| <b>INSURED</b><br>WSP USA Inc.<br>One Penn Plaza<br>New York, NY 10119  | <b>INSURER B:</b>                         |                       |
|   | <b>INSURER C:</b>                         |                       |
|   | <b>INSURER D:</b>                         |                       |
|   | <b>INSURER E:</b>                         |                       |
|   | <b>INSURER F:</b>                         |                       |

**COVERAGES** **CERTIFICATE NUMBER:** 1715832721 **REVISION NUMBER:**

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

| INSR LTR | TYPE OF INSURANCE   | ADDL INSD | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS   |
|----------|---|-----------|----------|---------------|-------------------------|-------------------------|--|
|          | <b>COMMERCIAL GENERAL LIABILITY</b><br><input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR<br><br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC<br>OTHER:      |           |          |               |                         |                         | EACH OCCURRENCE \$<br>DAMAGE TO RENTED PREMISES (Ea occurrence) \$<br>MED EXP (Any one person) \$<br>PERSONAL & ADV INJURY \$<br>GENERAL AGGREGATE \$<br>PRODUCTS - COMP/OP AGG \$<br>\$ |
|          | <b>AUTOMOBILE LIABILITY</b><br><input type="checkbox"/> ANY AUTO<br><input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS<br><input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY                     |           |          |               |                         |                         | COMBINED SINGLE LIMIT (Ea accident) \$<br>BODILY INJURY (Per person) \$<br>BODILY INJURY (Per accident) \$<br>PROPERTY DAMAGE (Per accident) \$<br>\$                                    |
|          | <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR<br><b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE<br>DED <input type="checkbox"/> RETENTION \$   |           |          |               |                         |                         | EACH OCCURRENCE \$<br>AGGREGATE \$<br>\$   |
|          | <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y/N <input checked="" type="checkbox"/> N/A<br>(Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below |           |          |               |                         |                         | <input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER<br>E.L. EACH ACCIDENT \$<br>E.L. DISEASE - EA EMPLOYEE \$<br>E.L. DISEASE - POLICY LIMIT \$                          |
| A        | Professional Liability CLAIMS-MADE  |           |          | QPL0022630    | 11/1/2025               | 10/31/2026              | Per Claim \$2,000,000<br>Aggregate \$2,000,000   |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 THIRTY (30) DAYS NOTICE OF CANCELLATION.  
 Opportunity #US-WSP-202304667 | Project Description: General Plan Update for the City of Santa Fe, New Mexico.

|   |   |
|---|---|
| <b>CERTIFICATE HOLDER</b><br><br>City of Santa Fe<br>200 Lincoln Ave.<br>Santa Fe NM 87501<br>USA | <b>CANCELLATION</b><br><br>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. |
|   | <b>AUTHORIZED REPRESENTATIVE</b><br>  |

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