Agenda **Regular Meeting of the Finance Committee**
May 26, 2026 at 5:00 PM
Council Chambers, City Hall
200 Lincoln Avenue

Procedures for Finance Committee Meeting

Viewing: *If the relevant technology is available to record the meeting in City Hall*, members of the public may stream the meeting live on the City of Santa Fe's YouTube channel. The YouTube live stream can be accessed from most smartphones, tablets, or computers.

The video recording*, if created,* of this and all past meetings of the Governing Body will also remain available for viewing at any time on the City's YouTube channel. Staff is available to help members of the public access pre-recorded Governing Body meetings online at any time during normal business hours. Please call 955-6521 for assistance.

1. Call to Order
2. Roll Call
3. Approval of Agenda
4. Approval of Consent Agenda
5. Public Comment
6. Presentations
7. Action Items: Consent Agenda

   a. Request for Approval of the May 11, 2026, Finance Committee Meeting Minutes. (Erminia Tapia, Business Operations Manager; emtapia@santafenm.gov)

      Committee Review:
      Finance Committee: 05/26/2026

   b. Request for Approval of a General Services Contract with Thatcher Company, Inc. for the Purchase of Sodium Hypochlorite Supply to Treat Microorganisms for the Wastewater Treatment Plant in the Total Amount of $2,000,000 for a Four-Year Term. (Paul Heerbrandt, P.E, Engineer Supervisor; pfheerbrandt@santafenm.gov)

Committee Review:
Finance Committee: 05/26/2026
Governing Body: 05/27/2026

c. Request for Approval of a General Services Contract with PVS DX Inc. for the Purchase of Sodium Hypochlorite Supply to Treat Microorganisms for the Wastewater Treatment Plant in the Total Amount of $2,000,000 for a Four-Year Term. (Paul Heerbrandt, P.E, Engineer Supervisor; pfheerbrandt@santafenm.gov)

Committee Review:
Finance Committee: 05/26/2026
Governing Body: 05/27/2026

d. Request for Approval of a Real Estate Donation Agreement with The Supreme Court Building Commission of The State of New Mexico to Donate the Public Alley Located on the North Side of East De Vargas Street for the Purpose of Enhancing Security of The Supreme Court Building, Its Judges, Staff, and Invitees. (Terry Lease, Asset Development Manager; tjlease@santafenm.gov)

Committee Review:
Finance Committee: 05/26/2026
Governing Body: 05/27/2026

e. Request for Approval of Grant Agreement FTA G-34 with the U.S. Department of Transportation via the Section 5307 Operating Assistance Formula Grant Program in the Total Amount of $2,167,799 through December 31, 2027. (Gabrielle Chavez, Transit Director of Administration; gnchavez@santafenm.gov)

1. Request for Approval of a Budget Adjustment Request (BAR) in the Total Amount of $2,167,799 from the FTA Grant to Transit Revenue.

Committee Review:
Public Works and Utilities Committee: 05/18/2026
Finance Committee: 05/26/2026
Governing Body: 05/27/2026

f. Request for Approval of a Budget Adjustment Request (BAR) to Reduce Grant Revenue from the New Mexico Local Match Grant from the New Mexico Department of Finance and Administration in the Total Amount of $2,558,970 for FY26. (Gabrielle Chavez, Transit Director of Administration; gnchavez@santafenm.gov)

Committee Review:
Public Works and Utilities Committee: 05/18/2026

Finance Committee: 05/26/2026
Governing Body: 05/27/2026

g. Request for Approval of a Grant Agreement with New Mexico Office of the State Engineer in the Total Amount of $1,354,479 for Planning and Design for the Rehabilitation of McClure Dam Award No. MG26-91655 with a Reversion Date of September 24, 2027. (Taylor Jurgens, Engineer; tyjurgens@santafenm.gov)

Committee Review:
Public Works and Utilities Committee: 05/18/2026
Finance Committee: 05/26/2026
Governing Body: 05/27/2026

h. Request for Approval of a Special Appropriation Grant Agreement with the New Mexico Office of the State Engineer to Reimburse Fiscal Year 2026 Costs Associated with Critical Maintenance and Improvements at Nichols Dam in the Total Amount of $2,000,000 through June 30, 2026. (Jesse Roach, Interim Public Utilities Department Director; jdroach@santafenm.gov)

Committee Review:
Public Works and Utilities Committee: 05/18/2026
Finance Committee: 05/26/2026
Governing Body: 05/27/2026

i. CONSIDERATION OF RESOLUTION NO. 2026-____. (Councilor Jamie Cassutt, Councilor Amanda Chavez, Mayor Michael Garcia)
A Resolution Approving the Adoption of the Santa Fe Midtown Metropolitan Redevelopment Area Plan. (Carly Venditti, Midtown Redevelopment Agency Department Deputy Director; cavenditti@santafenm.gov)

Committee Review:
Governing Body (Introduced): 05/13/2026
Public Works and Utilities Committee: 05/18/2026
Quality of Life Committee: 05/20/2026
Finance Committee: 05/26/2026
Metropolitan Development Commission: 06/03/2026
Economic Development Advisory Committee: 06/03/2026
Governing Body (Public Hearing): 06/10/2026

j. CONSIDERATION OF BILL NO. 2026-9. ADOPTION OF ORDINANCE NO. 2026-____. (Councilor Pilar Faulkner, Councilor Lee Garcia, Councilor Amanda Chavez)
A Bill Amending Subsection 12-6-12.3 of Article VI of the Uniform Traffic Ordinance ("UTO") to Eliminate Minimum Penalties for Reckless Driving and Raising Maximum Penalties From Twenty-Five Dollars ($25) to Two Hundred and Fifty Dollars ($250) for First Convictions and From Three Hundred Dollars ($300) to Five Hundred Dollars ($500) for Second or Subsequent Convictions; Creating a New Subsection 12-6-12.4A of Article VI of the UTO, Exhibit A to Chapter 24, SFCC 1987 to Define, Criminalize, and Penalize "Aggressive Driving"; Amending the UTO's Schedule a Traffic Violation Penalty

Assessment Schedule to Increase Certain Penalties, to Specify that all Reckless Driving Fines, Aggressive Driving Fines, as Well as all Schedule A Penalties (Except for Those Dedicated to Traffic Calming) Shall be Split Equally Between the Law Enforcement Fund and the Fire Support Services Fund, and to Require a Mandatory Court Appearance for Violations Related to Aggressive Driving; Creating a New Subsection 12-6-12.25 of Article VI "Engaging in Prolonged, Deliberate, and/or Excessive Tailing of Another Vehicle" and Establishing a Penalty in Santa Fe's UTO, Schedule A, Traffic Violation Penalty Assessment Schedule for the Same; Creating a New Subsection 12-6-12.26 of Article VI "Unsafe Sudden Stops" and Establishing a Penalty in Santa Fe's UTO, Schedule A, Traffic Violation Penalty Assessment Schedule for the Same; Creating a New Subsection 12-6-12.27 of Article VI "Throwing Items Outside of Vehicle at Another Vehicle or at a Pedestrian" and Establishing a Penalty in Santa Fe's UTO, Schedule A, Traffic Violation Penalty Assessment Schedule for the Same. (Ben Valdez, Deputy Chief of Police; bpvaldez@santafenm.gov)

Committee Review:
Governing Body (Introduction): 04/29/2026
Governing Body (Public Comment): 05/13/2026
Quality of Life Committee: 05/20/2026
Finance Committee: 05/26/2026
Governing Body (Public Hearing): 06/10/2026

8. Action Items: Discussion Agenda

   a. Request for Approval of a Memorandum of Agreement with Santa Fe County Designating the City as Lead Agency for Funding Applications, Project Administration and Construction of the Henry Lynch Road Reconstruction and Roundabout Project, Including Portions within County Jurisdiction. (Romella Glorioso-Moss, Complete Streets Capital Project Manager, rsglorioso-moss@santafenm.gov)

   Committee Review:
   Finance Committee: 05/26/2026
   Governing Body: 05/27/2026

   b. Request for Approval of Amendment No. 2 to General Plan Update Contract Item #24-0352 with WSP USA Inc. to Increase the Compensation by $649,125.00 for a New Total Amount of $2,691,220.56 to Expedite the Project Schedule, Provide Additional Public Engagement and Enhance Functionality of the Digital User Platform. (Heather Lamboy, Planning and Land Use Department Director; hllamboy@santafenm.gov and Janice Biletnikoff, Long-Range Strategic Planner; jibiletnikoff@santafenm.gov).

   Committee Review:
   Finance Committee: 05/26/2026
   Governing Body: 05/27/26

   c. CONSIDERATION OF RESOLUTION NO. 2026-____. (Mayor Michael Garcia)
   A Resolution Adopting the City of Santa Fe's Fiscal Year 2026/2027 Operating Budget for

the City of Santa Fe. (Andy Hopkins, Budget officer; ajhopkins@santafenm.gov)

Committee Review:
Governing Body (Introduced): 05/13/2026
Special Governing Body (Budget Hearing): 05/14/2026
Special Governing Body (Budget Hearing): 05/15/2026
Finance Committee: 05/26/2026
Governing Body: 05/27/2026

9. Matters from Staff
10. Matters from the Committee
11. Matters from the Chair
12. Next Meeting: Monday, June 8, 2026
13. Adjourn

Persons with disabilities in need of accommodations, contact the City Clerk's office at 955-6521, five (5) working days prior to meeting date.

Regular Meeting of the Finance Committee
May 11, 2026 at 5:00 PM
Council Chambers, City Hall
200 Lincoln Avenue
MINUTES

---

1. Call to Order

The Regular Meeting of the Finance Committee was called to order by Councilor Faulkner at 5:01 PM, on Monday, May 11, 2026, in the Council Chambers, CIty Hall, 200 Lincoln Avenue, Santa Fe, New Mexico.

2. Roll Call

MEMBERS PRESENT
Councilor Jamie Cassutt
Councilor Pilar Faulkner
Councilor Lee Garcia
Councilor Paul Bustamante

MEMBERS EXCUSED
Councilor Alma Castro

OTHER PARTICIPANTS ATTENDING
Andrea K. Phillips, Deputy City Manager and Interim Finance Director
Erminia M. Tapia, Business Operations Manager

3. Approval of Agenda

MOTION A motion was made by Councilor Bustamante, seconded by Councilor Cassutt, to Approve.

VOTE The motion Passed on a roll call vote.

4. Approval of Consent Agenda

MOTION A motion was made by Councilor Cassutt, seconded by Councilor Bustamante, to Approve.

VOTE The motion Passed on a roll call vote.

5. Presentations

   a. Grand Summit Recovery and Workforce Development. (Dr. Hosai Ehsan, President/Owner; hosai@grandsummit.org and Jerry Ortiz y Pino, Supporter; jortizyp@msn.org and Katie Ortiz y Pino, Executive Assistant; katieop@grandsummit.org)

6. Action Items: Consent Agenda

a. Request for Approval of the April 27, 2026 Finance Committee Meeting Minutes. (Erminia M. Tapia, Business Operations Manager; emtapia@santafenm.gov)

Committee Review:
Finance Committee: 05/11/2026

Approved on Consent.

b. Request For Approval of Amendment No. 1 to the U.S. Department of Transportation Federal Aviation Administration (FAA) Grant Number 065 to Increase the Compensation by $244,007 for a New Total Contract Amount of $6,333,707 for the Reconstruction of the Terminal Apron. (Jimmy Gunn, Interim Airport Director; jdgunn@santafenm.gov; Paulette Ortiz, Administrative Grant Administrator; pkortiz@santafenm.gov)

1. Request for Approval of a Budget Adjustment Request (BAR) to Allocate $244,007 from the FAA Grant Amendment to WIP Construction for the Reconstruction of the Terminal Apron.

Committee Review:
Public Works and Utilities Committee: 05/04/2026
Finance Committee: 05/11/2026
Governing Body: 05/13/2026

Approved on Consent.

c. Request for Approval of Goods and Services Contract with Trojan Technologies, Inc. for the Purchase of UV3000 Replacement Parts for the Public Utilities Department in the Total Amount of $2,000,000 for a Four Year Term. (Paul Heerbrandt, P.E., Engineer Supervisor; pfheerbrandt@santafenm.gov)

Committee Review
Public Works and Utilities Committee: 05/04/2026
Finance Committee: 05/11/2026
Governing Body: 05/13/2026

Approved on Consent.

d. Request for Approval of a General Services Contract with Cassidy's Landscaping, Inc in the Total Amount of $1,081,875 Including NMGRT for On-Call Landscape and Snow and Ice Control for a Term of Ten Years. (Sebastian Gallegos, Airport Project Manager; sfgallegos@santafenm.gov)

Committee Review
Public Works and Utilities Committee: 05/04/2026

Finance Committee: 05/11/2026
Governing Body: 05/13/2026

Approved on Consent.

e. Request for Approval of a General Services Contract with Mark A. Lopez Development in the Total Amount of $1,081,875 Including NMGRT for On-Call Landscape and Snow and Ice Control for a Term of Ten Years. (Sebastian Gallegos, Airport Project Manager, sfgallegos@santafenm.gov)

Committee Review
Public Works and Utilities Committee: 05/04/2026
Finance Committee: 05/11/2026
Governing Body: 05/13/2026

Approved on Consent.

f. Request for Approval of Amendment No. 1 to Professional Service Contract Item # 25-0451 with St. Elizabeth's Shelter Corporation to Increase Compensation by $340,000 for a New Total Amount of $590,000 and to Extend the Term to June 30, 2027, for Homeless Services. (Kristen Woods, Youth and Family Services Program Manager; krwoods@santafenm.gov)

Committee Review:
Quality of Life Committee: 05/06/2026
Finance Committee: 05/11/2026
Governing Body: 05/13/2026

Approved on Consent.

g. Request for Approval of Amendment No. 1 to Professional Service Contract Item # 25-0364 with Christ Lutheran Church to Increase Compensation by $136,000 for a New Total Amount of $272,000 and to Extend the Term to August 8, 2027, for Homeless Services. (Kristen Woods, Youth and Family Services Program Manager; krwoods@santafenm.gov)

Committee Review:
Quality of Life Committee: 05/06/2026
Finance Committee: 05/11/2026
Governing Body: 05/13/2026

Approved on Consent.

h. Request for Approval of the Community Development Block Grant Draft 2026 Annual Action Plan in Compliance with Housing and Urban Development, Public Hearing, and Public Comment. (Faviola Chavez, Affordable Housing Director; fachavez@santafenm.gov)

Committee Review:
Quality of Life Committee: 05/06/2026
Finance Committee: 05/11/2026
Governing Body: 05/13/2026

Approved on Consent.

i. CONSIDERATION OF RESOLUTION NO. 2026-_____. (Councilor Jamie Cassutt and Councilor Amanda Chavez)
A Resolution Authorizing the Installation of Fifty Banners from June 1, 2026 to June 1, 2027, on City of Santa Fe-Owned Light Poles, on the Midtown Campus to Promote the Opening of New Businesses and Draw Attention to the Midtown Campus. (Carly Venditti, Metropolitan Redevelopment Agency Deputy Director; cavenditti@santafenm.gov)

Committee Review:
Governing Body (Introduced): 04/29/2026
Public Works and Utilities Committee: 05/04/1016
Finance Committee: 05/11/2026
Governing Body: 05/13/2026

Approved on Consent.

7. Action Items: Discussion Agenda

8. Matters from the Committee

9. Matters from the Chair

   a. Discussion of Homelessness Task Force. (Pilar Faulkner, City Councilor)

10. Next Meeting: Tuesday, May 26, 2026

11. Adjourn

Meeting Adjourned at 5:38 P.M.

ERMINIA TAPIA
_____ _____
Liaison Chair

CITY OF SANTA FE

The Purchasing Memo

Date: May 11, 2026

To: Governing Body, Finance Committee, and Public Works & Utilities Committee

From: P. Fred Heerbrandt, P.E., Engineer Supervisor P. Fred Heerbrandt, P.E.

Via: Michael Dozier, Director Wastewater Management

Subject: Sodium Hypochlorite Supply

Vendor Name: Thatcher Company, Inc.

Munis Vendor Number: 10962

ITEM AND ISSUE:

The Public Utilities Department respectfully requests your review and approval of a General Services Contract in the total amount of $2,000,000 including Gross Receipt Tax with a maximum of $500,000 per year for Sodium Hypochlorite for a term of four (4) years with Thatcher Company, Inc.

CONTRACT NUMBER:

The FY26 Munis contract number is 3260424

BACKGROUND AND SUMMARY:

Sodium hypochlorite is an industrial strength bleach. We use this product to control disruptive microorganisms that sometime cause issues in the aeration tanks at the WWRF. It is also used to clean and disinfect equipment and facilities. This contract will establish a reliable source of supply for this vital chemical solution.

PRIOR APPROVALS AND SUPPORTING INFORMATION:

FUNDING SOURCE:

Fund Name/Number: Wastewater Enterprise Fund/Fund 500

Munis Org Name/Number: WW – Treatment Plant/5000367

Munis Object Name/Number: Operating Supplies/530200

Budget Officer / Designee: Andy Hopkins **Date:** 05/11/2026

Budget Officer Comment/Exceptions: _____

PROCUREMENT METHOD:

The procurement method used was NMSA 1978, Section 13-1-102, ITB

FY26-ITB-059 was advertised on February 4, 2026 and opened on February 27, 2026. There were three

bidders with two awards.

Chief Procurement Officer (CPO)/Designee: JoAnn Lovato Montano **Date:** 05/11/2026

AP (May 11, 2026 10:42:08 MDT)

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:

General Services Contract with Bid sheet
Bid Tab

GENERAL SERVICES CONTRACT

Sodium Hypochlorite Supply

THIS CONTRACT is made and entered into by and between the City of Santa Fe, herein after referred to as the "City," and Thatcher Company of Nevada, Inc herein after referred to as the "Contractor."

IT IS MUTUALLY AGREED BETWEEN THE PARTIES:

I. DEFINITIONS

A. "Products and Services Schedule" refers to the complete list of products and services offered under this Contract and the price for each. Product and service descriptions may be amended with the prior approval of the Contract Administrator. New products and services shall not be added to the Products and Services Schedule.

B. "Business Hours" means 8:00 a.m. to 5:00 p.m. Mountain Time.

C. "Fiscal Year" means the twelve-month period beginning on July 1 and ending on June 30 of the following calendar year.

D. "Fiscal Year Quarters" means the four three-month periods within the City's fiscal year, defined as follows: Quarter 1 is July 1 through September 30; Quarter 2 is October 1 through December 31; Quarter 3 is January 1 through March 31; and Quarter 4 is April 1 through June 30.

II. SCOPE OF WORK

The Contractor shall provide Sodium Hypochlorite Solution to the City:

A. SPECIFICATIONS

Sodium Hypochlorite Solution

Product Specifications:

1. TRADE NAME: 12.5% Sodium Hypochlorite Solution
2. CONCENTRATION

3. ACCEPTABLE:
   12.5% MINIMUM Percent by weight (15.0% Trade Percent)
   15.6% MAXIMUM Percent by weight (20.0%Trade Percent)
4. CHEMICAL FORMULA: NaOCl
5. MOLECULAR WEIGHT: 74.45
6. APPEARANCE: Clear, light yellow-green liquid
7. pH: 11.2 Minimum
8. SPECIFIC GRAVITY: 1.20 (Minimum); 1.25 (Maximum)
9. FREEZING POINT: <10 deg. F
10. SOLUTION WEIGHT: 10.0 to 10.4 pounds per gallon, Product must be filtered and be able to offload through 40-mesh strainer
11. INSOLUBLE MATTER: Maximum of 30 mg/L retained on 0.45µm filter according to Standard Methods for the Examination of Water and Wastewater 2540 D
12. SODIUM HYDROXIDE: 1.5% by weight, maximum
13. COPPER (Cu): 0.5 ppm, maximum
14. NICKEL (Ni): 0.5 ppm, maximum
15. IRON (Fe): 1.0 ppm, maximum

B. SPECIAL TERMS AND CONDITIONS

1. City will purchase sodium hypochlorite solution from the Contractor for use at City's Paseo Real Wastewater Reclamation Facility, 73 Paseo Real, Santa Fe, NM 87507.

2. Ordering/Shipments

   i. City will order shipments of sodium hypochlorite solution from the Contractor by email (Order), which the Contractor will acknowledge by replying to the email. The Contractor will comply with City's instructions concerning quantity, delivery date, and delivery location in the Order. City's delivery location is 73 Paseo Real, Santa Fe, NM 87507. The Contractor will make all deliveries between 7:00 a.m. and 4:00 p.m., Monday through Friday (normal delivery hours) unless otherwise requested and approved by City.

   ii. The Contractor will not be required to deliver more than 4,500 gallon within 48 hours of City's Order unless City is experiencing an emergency that can be resolved with sodium hypochlorite (Emergency). If City is experiencing an Emergency, City will order a shipment by phone, followed by a confirming email (Emergency Order), and the Contractor will deliver sodium hypochlorite to City within 24 hours of City’s Emergency Order.

   iii. City may refuse a shipment, at no cost to City, if the sodium hypochlorite product does not meet the specifications in this Contract or if the shipment arrives before or after the date set forth in the Order instructions in Section 2.A.

3. During off-loading work, the Contractor will park the Contractor's delivery vehicle in the location provided for that purpose by City. The Contractor will not park the Contractor's vehicle in other locations. The Contractor will follow City's procedures for off-loading chemicals, as instructed.

4. The Contractor's off-loading equipment will be compatible with City's chemical storage equipment. The Contractor will not connect the Contractor's off-loading hose or other off-loading device to City's sodium hypochlorite solution storage tank without the presence of an authorized City representative at the point of connection. The Contractor will not begin offloading sodium hypochlorite solution until the Contractor and City's representative have jointly confirmed that the sodium hypochlorite solution will be off-loaded into sodium hypochlorite solution totes or storage tanks, as directed. The Contractor will be responsible for all damages arising out of the improper offloading of sodium hypochlorite solution, including spillage and any delivery to the wrong storage tank.

5. The Contractor will plug, cap, blind-flange or contain all discharge connections and hose ends to prevent any spillage of sodium hypochlorite solution. The Contractor will be responsible for the cleanup and removal from City's premises of all spillage, contaminated matter and contaminated cleanup material. City will notify the Contractor of all spillage, contaminated matter and contaminated cleanup material not cleaned up and removed by the Contractor's truck driver. If the Contractor does not clean up and remove all spillage, contaminated matter and contaminated cleanup material from City's premises within four hours of City's notification, City will clean up and remove the spillage, contaminated matter and contaminated cleanup material and the Contractor will reimburse City for the entire cost of cleanup. City may deduct the cleanup costs from amounts owed to the Contractor under this Contract.

6. The Contractor will mail, fax or e-mail an Affidavit of Compliance with the specification information listed below for each delivery. The Affidavit will be delivered to City within seven calendar days of City's receipt of the delivery to which it refers. The Contractor will inform City prior to commencing deliveries of the identity of the Contractor's personnel who will be authorized to sign the Affidavit. The Affidavit will contain the following:

i. Sodium hypochlorite solution

   a. Percent by Weight (NaOCl) or Percent by Weight (Available Cl2)

   b. Specific Weight of Solution, lb./gal.

   c. Date of Shipment

7. Each quarter the Contractor will test at least one sample of the sodium hypochlorite solution delivered to City. On or before the last day of each quarter, the Contractor will provide a quarterly batch analysis laboratory report to City that identifies the amounts of the items listed below in the sample of sodium hypochlorite solution. The report will be delivered with an invoice. The Contractor will inform City prior to commencing deliveries of the identity of the Contractor's personnel who will be authorized to sign the report. The report will contain the following:

i. Percent by Weight (NaOCl) or Percent by Weight (Available C12)

ii. Copper

iii. Iron

iv. Nickel

v. pH

vi. Free Alkali (expressed as % NaOH)

vii. Insoluble Matter (% by weight)

viii. Specific Weight of Solution, lb./gal.

ix. Date of Shipment

8. The Contractor will provide City with a telephone number where City can either communicate with the Contractor or leave messages at all times. The Contractor will return all calls no later than two hours after City leaves a message.

9. The Contractor warrants that the Contractor's product will meet City's specifications, mentioned above in Section A, Specifications. City will have the right to test Contractor's product at any time. Contractor will provide a sample from a delivered quantity of sodium hypochlorite solution at City's request. If the Contractor's Affidavit of Compliance or laboratory report or City's tests indicate that the Contractor's product does not meet City's specifications, City will have the right to require Contractor to pay for the testing of the sodium hypochlorite solution and the Contractor will not charge City for the load tested. The foregoing will not be construed to limit City's legal rights if the Contractor breaches a warranty.

10. The Contractor will ensure that the Contractor's subcontractors, including delivery contractors and delivery truck drivers, have read and understand these specifications.

11. City’s payment of the fixed price will be considered payment for all of Contractor’s obligations under this Contract. City has the right to reject Contractor’s invoices that reflect pricing higher than the price bid and inserted herein.

12. The Contractor will send a current Safety Data Sheet (SDS) for the sodium hypochlorite solution by email to safetyteam@cleanwaterservices.org prior to commencing deliveries. Contractor will send a new SDS to City each time the SDS is updated.

III. COMPENSATION

A. Payment. The City shall compensate the Contractor on an as needed basis based on the fixed rates specified in Exhibit A. For the goods described in the scope of work, the City agrees to pay the Contractor up to a maximum of $500,000.00 annually, excluding Gross Receipts Tax (GRT). The total compensation for this Contract, excluding GRT is $2,000,000.00.

B. The compensation represents a maximum amount. The Contractor must notify the City when the Services provided under this Contract approach 90% of compensation total. Services rendered beyond the maximum compensation amount will not be reimbursed unless the Contract is amended in writing prior to the provision of such services.

C. Invoicing and Payment Terms Payment will be made upon the City's acceptance of deliverables and receipt of a detailed, certified invoice from the Contractor. Payments will be sent to the Contractor’s designated address. The City shall issue payment in accordance with the timelines required by law.

Invoices must be submitted no later than fifteen (15) days after the Contract's termination. Late invoices will not be processed or paid.

IV. TERM

THIS CONTRACT SHALL NOT BECOME EFFECTIVE UNTIL APPROVED BY THE CITY. This contract shall terminate **four (4) years from date of final signature**. A contract for general services may not exceed ten (10) years, including all extensions and renewals, except as otherwise provided by NMSA 1978, Sections 13-1-150 through 13-1-152 or SFCC 1987, Section 11-13.

V. 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 sub-contractors due to any of the above, unless the City shall determine that the supplies or services to be furnished by the sub-contractor were obtainable from other sources in sufficient time to permit the Contractor to meet the required delivery scheduled. The rights and remedies of the City provided in this paragraph shall not be exclusive and are in addition to any other rights now being provided by law or under this contract.

VI. TERMINATION

A. Grounds. The City may terminate this Contract 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 Contract based upon the City's uncured, material breach of this Contract.

B. Notice: City Opportunity to Cure.

1. The City shall give the 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 Contract 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 Contract 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 Contract, the Contractor is suspended or debarred by the City; or (iii) the Contract is terminated pursuant to the "Appropriations" Article of this Contract.

C. Liability. Except as otherwise expressly allowed or provided under this Contract, 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 Contract. 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 CONTRACT.*

VII. AMENDMENT

A. This Contract 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 the "Termination" Article herein, or to agree to the reduced funding.

VIII. STATUS OF CONTRACTOR

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

IX. 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.

X. 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.

XI. 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.

XII. INSPECTION OF PLANT

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

XIII. COMMERCIAL WARRANTY

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

XIV. CONDITION OF PROPOSED ITEMS

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

XV. RECORDS AND AUDIT

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

XVI. APPROPRIATIONS

The terms of this Contract, and any orders placed under it, 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, and any orders placed under it, shall terminate upon written notice being given by the City to the Contractor. The City's decision as to whether sufficient appropriations are available shall be accepted by the Contractor and shall be final. If the City proposes an amendment to the 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.

XVII. RELEASE

The Contractor, upon final payment of the amount due under this Contract, releases the City, its officers, and employees, from all liabilities, claims and obligations whatsoever arising from or under this Contract. 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.

XVIII. 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 prior written approval by the City.

XIX. CONFLICT OF INTEREST

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

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

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.

XX. APPROVAL OF CONTRACTOR REPRESENTATIVES

The City reserves the right to require a change in the Contractor's assigned representatives if they are not adequately serving the City's needs.

XXI. SCOPE OF CONTRACT; 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 the FY26-ITB-059 - Sodium Hypochlorite Supply and the Contractor's response to such document(s) are incorporated herein by reference and is included in the order of precedence.

XXII. NOTICE

The Procurement Code, 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 bribes, gratuities, and kickbacks.

XXIII. EQUAL OPPORTUNITY COMPLIANCE

The Contractor agrees to abide by all federal and state laws, and local Ordinances, pertaining to equal employment opportunity. In accordance with all such laws, rules, and regulations, the Contractor agrees to assure that no person in the United States shall on the grounds of race, religion, color, national origin, ancestry, sex, age, physical or mental handicap, or serious medical condition, spousal affiliation, sexual orientation or gender identity, be excluded from employment with or participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity performed under this 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.

XXIV. INDEMNIFICATION

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

XXV. 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, NMSA 1978, Section 41-4-1, et. seq., 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.

XXVI. 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.

XXVII. LIMITATION OF LIABILITY

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

XXVIII. INCORPORATION BY REFERENCE AND PRECEDENCE

If this Contract has been procured pursuant to an Invitation to Bid, this Contract is derived from (1) the Invitation to Bid, (including any written clarifications to the Invitation to Bid and any City response to questions); (2) the Contractor’s response to the Invitation to Bid.

In the event of a dispute under this Contract, applicable documents will be referred to for the purpose of clarification or for additional detail in the following order of precedence: (1) amendments to the Contract in reverse chronological order; (2) the Contract, including the scope of work and all terms and conditions thereof; (3) the Invitation to Bid, including attachments thereto and written responses to questions and written clarifications; and (4) the Contractor's response to the Invitation to Bid.

XXIX. 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.

XXX. INSPECTION

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

XXXI. INSPECTION OF SERVICES

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

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

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

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

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

1. require the Contractor to take necessary action(s) to ensure that future performance conforms to the requirements of this Contract; and

2. reduce the contract price to reflect the reduced value of the services performed.

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

1. by contract or otherwise, perform the services and charge to the Contractor any cost incurred by the City that is directly related to the performance of such service; or

2. terminate the contract for default.

XXXII. INSURANCE

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

A. COMMERCIAL GENERAL LIABILITY

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

B. BUSINESS AUTOMOBILE LIABILITY

insurance for all owned, non-owned vehicles, with a combined single limit not less than $1,000,000 per accident.

C. BROADER COVERAGE AND LIMITS

for 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.

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.

XXXIII. IMPRACTICALITY OF PERFORMANCE

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

XXXIV. 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.

XXXV. 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.

XXXVI. PATENT, COPYRIGHT AND TRADE SECRET INDEMNIFICATION

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

1. give the Contractor prompt written notice within 48 hours of any claim;

2. allow the Contractor to control the defense of settlement of the claim; and

3. cooperate with the Contractor in a reasonable way to facilitate the defense or settlement of the claim.

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

1. provide the City the right to continue using the product or service and fully indemnify the City against all claims that may arise out of the City's use of the product or service;

2. replace or modify the product or service so that it becomes non-infringing; or,

3. accept the return of the product or service and refund an amount equal to the value of the returned product or service, less the unpaid portion of the purchase price and any other amounts, which are due to the Contractor. The Contractor's obligation will be void as to any product or service modified by the City to the extent such modification is the cause of the claim.

XXXVII. SURVIVAL

The Contract paragraphs titled "Patent, Copyright, Trademark, and Trade Secret Indemnification; Indemnification; and Limit of Liability" shall survive the expiration of this Contract. Software licenses, leases, maintenance and any other unexpired Agreements that were entered into under the terms and conditions of this Contract shall survive this Contract.

XXXVIII. DISCLOSURE REGARDING RESPONSIBILITY

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

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

C. The Contractor shall provide immediate written notice to the City if, at any time during the term of this Contract, 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 Contract. However, the disclosure will be considered in the determination of the Contractor's responsibility and ability to perform under this Contract. Failure of the Contractor to furnish a disclosure or provide additional information as requested will be grounds for immediate termination of this Contract pursuant to the conditions set forth in the "Termination" Article of this Contract.

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 Contract. If during the performance of the contract, the Contractor is indicted for or otherwise criminally or civilly charged by any government entity (federal, state or local) with commission of any offenses named in this document the Contractor must provide immediate written notice to the City. If it is later determined that the Contractor knowingly rendered an erroneous disclosure, in addition to other remedies available to the Government, the City may terminate the involved contract for cause. Still further the City may suspend or debar the Contractor from eligibility for future solicitations until such time as the matter is resolved to the satisfaction of the City.

XXXIX. SUSPENSION, DELAY OR INTERRUPTION OF WORK

The City may, without cause, order the Contractor, in writing, to suspend, delay or interrupt the work in whole or in part for such period of time as the City may determine. The contract sum and contract time shall be adjusted for increases in cost and/or time associated with Contractor's compliance therewith. Upon receipt of such notice, Contractor shall leave the jobsite and any equipment in a safe condition prior to departing. Contractor must assert rights to additional compensation within thirty (30) days after suspension of work is lifted and return to work is authorized. Any compensation requested for which entitlement is granted and the contract sum adjusted, shall have profit included (for work completed) and for cost only (not profit) for Contractor costs incurred directly tied to the suspension itself and not otherwise covered by Contract remedy. Any change in Total Compensation must be reflected in an Amendment executed pursuant to the "Amendment" Article of this Contract.

XL. NOTIFICATION

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

To the City:	**Department**	**To the Contractor:**
Chief Procurement Officer purchasing@santafenm.gov PO Box 909 Santa Fe, NM 87504-0909	Wastewater Engineer Supervisor 73 Paseo Real Santa Fe, NM 87507 pfheerbrandt@santafenm.gov (505) 955-4623	Thatcher Company of Nevada, Inc Michael Mitchell P. O. Box 27407 Salt Lake City, UT 84127-0407 bids4@tchem.com 801-972-4587

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

XLI. SUCCESSION

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

The Rest of the Page is Intentionally Left Blank

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 J. GARCIA, MAYOR

CONTRACTOR:

Mike Mitchell (May 8, 2026 08:46:02 MDT)
Mike Mitchell, President

DATE: May 8, 2026

NMBTIN: _____

ATTEST:

_____
GERALYN CARDENAS, CITY CLERK

Approved to form and legal sufficiency by:

Marcos D. Martinez
Marcos D. Martinez (May 8, 2026 08:49:37 MDT)
_____
MARCOS D. MARTINEZ, CITY ATTORNEY

APPROVED FOR FINANCES:

ANDREA PHILLIPS (May 15, 2026 15:58:49 MDT)
_____
FINANCE DIRECTOR

Exhibit A

Line Item	Description	Quantity	Unit of Measure	Thatcher Company of Nevada, Inc Unit Cost
1	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Base tier: 0–4,999 gallons per delivery)	1	Gallon	$3.10
2	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Tier 1: 5,000–9,999 gallons per delivery).	5000	Gallon	$0.00
3	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Tier 2: 10,000 gallons or more per delivery).	10000	Gallon	$0.00
4	Bulk Delivery Surcharge/Credit, if any, for Deliveries Under Minimum Drop Size (per delivery).	1	Each	$0.00
5	Delivery Charge for Off-schedule or Emergency Deliveries (per delivery)	1	Each	$0.00
6	Delivery Charge for Refilling Totes at Site (Approx. 20 totes)	1	Each	$0.00

City of Santa Fe, NM
Purchasing
Travis Dutton-Leyda, Chief Procurement Officer
200 Lincoln Avenue, Santa Fe, NM 87501

EVALUATION TABULATION

ITB No. FY26-ITB-059

Sodium Hypochlorite Supply

RESPONSE DEADLINE: February 27, 2026 at 2:00 pm
Report Generated: Monday, May 11, 2026

TABLE 1
Primary award cells are green and Backup award cells are gray

Line Item	Description	Quantity	Unit of Measure	Brenntag Pacific, LLC Unit Cost	PVS DX Unit Cost	Thatcher Company of Nevada, Inc Unit Cost
1	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Base tier: 0–4,999 gallons per delivery)	1	Gallon	$0.00	$3.20	$3.10
2	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Tier 1: 5,000–9,999 gallons per delivery).	5000	Gallon	$3.10	$3.20	$0.00
3	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Tier 2: 10,000 gallons or more per delivery).	10000	Gallon	$0.00	$3.20	$0.00
4	Bulk Delivery Surcharge/Credit, if any, for Deliveries Under Minimum Drop Size (per delivery).	1	Each	$0.00	$500.00	$0.00
5	Delivery Charge for Off-schedule or Emergency Deliveries (per delivery)	1	Each	$1,500.00	$500.00	$0.00
6	Delivery Charge for Refilling Totes at Site (Approx. 20 totes)	1	Each	$750.00	$300.00	$0.00

VENDOR QUESTIONNAIRE PASS/FAIL

Question Title	Brenntag Pacific, LLC	PVS DX	Thatcher Company of Nevada, Inc
Financial Interest	Pass	Pass	Pass
Specify by name	No Response	No Response	No Response
NM Gross Receipts Tax # (NMBTIN)	Pass	Pass	Pass
Payment Terms	Pass		Pass
Contractor's Delivery	Pass	Pass	Pass
Preference			

CITY OF SANTA FE

The Purchasing Memo

Date: May 7, 2026

To: Governing Body, Finance Committee, and Public Works & Utilities Committee

From: P. Fred Heerbrandt, P.E., Engineer Supervisor P. Fred Heerbrandt, P.E.

Via: Michael Dozier, Director Wastewater Management

Subject: Sodium Hypochlorite Supply

Vendor Name: PVS DX Inc,

Munis Vendor Number: 10345

ITEM AND ISSUE:

The Public Utilities Department respectfully requests your review and approval of a General Services Contract for Sodium Hypochlorite in the total amount of $500,000 per year for a total contract amount of $2,000,000 including Gross Receipt Tax for a term of four (4) years with PVS DX Inc.

CONTRACT NUMBER:

The FY26 Munis contract number is 3260423

BACKGROUND AND SUMMARY:

Sodium hypochlorite is an industrial strength bleach. We use this product to control disruptive microorganisms that sometime cause issues in the aeration tanks at the WWRF. It is also used to clean and disinfect equipment and facilities. This contract will establish a reliable source of supply for this vital chemical solution.

PRIOR APPROVALS AND SUPPORTING INFORMATION:

FUNDING SOURCE:

Fund Name/Number: Wastewater Enterprise Fund/Fund 500

Munis Org Name/Number: WW – Treatment Plant/5000367

Munis Object Name/Number: Operating Supplies/530200

Budget Officer / Designee: Andy Hopkins **Date:** 05/11/2026

Budget Officer Comment/Exceptions: _____

PROCUREMENT METHOD:

The procurement method used was NMSA 1978, Section 13-1-102, ITB

FY26-ITB-059 was advertised on February 4, 2026 and opened on February 27, 2026. There were three

bidders with two awards.

Chief Procurement Officer (CPO)/Designee: JoAnn Lovato Montano **Date:** 05/11/2026

AP
AP (May 11, 2026 10:44:55 MDT)

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:

General Services Contract with Bid sheet
Bid Tab

CITY OF SANTA FE

GENERAL SERVICES CONTRACT #3260423

Sodium Hypochlorite Supply

THIS CONTRACT is made and entered into by and between the City of Santa Fe, herein after referred to as the "City," and PVS DX, Inc. herein after referred to as the "Contractor."

IT IS MUTUALLY AGREED BETWEEN THE PARTIES:

I. DEFINITIONS

A. "Products and Services Schedule" refers to the complete list of products and services offered under this Contract and the price for each. Product and service descriptions may be amended with the prior approval of the Contract Administrator. New products and services shall not be added to the Products and Services Schedule.

B. "Business Hours" means 8:00 a.m. to 5:00 p.m. Mountain Time.

C. "Fiscal Year" means the twelve-month period beginning on July 1 and ending on June 30 of the following calendar year.

D. "Fiscal Year Quarters" means the four three-month periods within the City's fiscal year, defined as follows: Quarter 1 is July 1 through September 30; Quarter 2 is October 1 through December 31; Quarter 3 is January 1 through March 31; and Quarter 4 is April 1 through June 30.

II. SCOPE OF WORK

The Contractor shall provide Sodium Hypochlorite Solution to the City:

A. SPECIFICATIONS

Sodium Hypochlorite Solution

Product Specifications:

1. TRADE NAME: 12.5% Sodium Hypochlorite Solution
2. CONCENTRATION
3. ACCEPTABLE:
   12.5% MINIMUM Percent by weight (15.0% Trade Percent)
   15.6% MAXIMUM Percent by weight (20.0%Trade Percent)

4. CHEMICAL FORMULA: NaOCl
5. MOLECULAR WEIGHT: 74.45
6. APPEARANCE: Clear, light yellow-green liquid
7. pH: 11.2 Minimum
8. SPECIFIC GRAVITY: 1.20 (Minimum); 1.25 (Maximum)
9. FREEZING POINT: <10 deg. F
10. SOLUTION WEIGHT: 10.0 to 10.4 pounds per gallon, Product must be filtered and be able to offload through 40-mesh strainer
11. INSOLUBLE MATTER: Maximum of 30 mg/L retained on 0.45µm filter according to Standard Methods for the Examination of Water and Wastewater 2540 D
12. SODIUM HYDROXIDE: 1.5% by weight, maximum
13. COPPER (Cu): 0.5 ppm, maximum
14. NICKEL (Ni): 0.5 ppm, maximum
15. IRON (Fe): 1.0 ppm, maximum

B. SPECIAL TERMS AND CONDITIONS

1. City will purchase sodium Hypochlorite solution from Contractor for use at City's Paseo Real Wastewater Reclamation Facility, 73 Paseo Real, Santa Fe, NM 87507.

2. Ordering/Shipments

   i. City will order shipments of sodium hypochlorite solution from the Contractor by email (Order), which the Contractor will acknowledge by replying to the email. The Contractor will comply with City's instructions concerning quantity, delivery date, and delivery location in the Order. City's delivery location is 73 Paseo Real, Santa Fe, NM 87507. The Contractor will make all deliveries between 7:00 a.m. and 4:00 p.m., Monday through Friday (normal delivery hours) unless otherwise requested and approved by City.

   ii. The Contractor will not be required to deliver more than 4,500 gallon within 48 hours of City's Order unless City is experiencing an emergency that can be resolved with sodium hypochlorite (Emergency). If City is experiencing an Emergency, City will order a shipment by phone, followed by a confirming email (Emergency Order), and the Contractor will deliver sodium hypochlorite to City within 24 hours of City’s Emergency Order.

   iii. City may refuse a shipment, at no cost to City, if the sodium hypochlorite product does not meet the specifications in this Contract or if the shipment arrives before or after the date set forth in the Order instructions in Section 2.A.

3. During off-loading work, the Contractor will park the Contractor's delivery vehicle in the location provided for that purpose by City. The Contractor will not park the Contractor's vehicle in

other locations. The Contractor will follow City's procedures for off-loading chemicals, as instructed.

4. The Contractor's off-loading equipment will be compatible with City's chemical storage equipment. The Contractor will not connect the Contractor's off-loading hose or other off-loading device to City's sodium hypochlorite solution storage tank without the presence of an authorized City representative at the point of connection. The Contractor will not begin offloading sodium hypochlorite solution until the Contractor and City's representative have jointly confirmed that the sodium hypochlorite solution will be off-loaded into sodium hypochlorite solution totes or storage tanks, as directed. The Contractor will be responsible for all damages arising out of the improper offloading of sodium hypochlorite solution, including spillage and any delivery to the wrong storage tank.

5. The Contractor will plug, cap, blind-flange or contain all discharge connections and hose ends to prevent any spillage of sodium hypochlorite solution. The Contractor will be responsible for the cleanup and removal from City's premises of all spillage, contaminated matter and contaminated cleanup material. City will notify the Contractor of all spillage, contaminated matter and contaminated cleanup material not cleaned up and removed by the Contractor's truck driver. If the Contractor does not clean up and remove all spillage, contaminated matter and contaminated cleanup material from City's premises within four hours of City's notification, City will clean up and remove the spillage, contaminated matter and contaminated cleanup material and the Contractor will reimburse City for the entire cost of cleanup. City may deduct the cleanup costs from amounts owed to the Contractor under this Contract.

6. The Contractor will mail, fax or e-mail an Affidavit of Compliance with the specification information listed below for each delivery. The Affidavit will be delivered to City within seven calendar days of City's receipt of the delivery to which it refers. The Contractor will inform City prior to commencing deliveries of the identity of the Contractor's personnel who will be authorized to sign the Affidavit. The Affidavit will contain the following:

i. Sodium hypochlorite solution

   a. Percent by Weight (NaOCl) or Percent by Weight (Available Cl2)

   b. Specific Weight of Solution, lb./gal.

   c. Date of Shipment

7. Each quarter the Contractor will test at least one sample of the sodium hypochlorite solution delivered to City. On or before the last day of each quarter, the Contractor will provide a quarterly batch analysis laboratory report to City that identifies the amounts of the items listed below in the sample of sodium hypochlorite solution. The report will be delivered with an invoice. The Contractor will inform City prior to commencing deliveries of the identity of the Contractor's personnel who will be authorized to sign the report. The report will contain the following:

i. Percent by Weight (NaOCl) or Percent by Weight (Available C12)

ii. Copper

iii. Iron

iv. Nickel

v. pH

vi. Free Alkali (expressed as % NaOH)

vii. Insoluble Matter (% by weight)

viii. Specific Weight of Solution, lb./gal.

ix. Date of Shipment

8. The Contractor will provide City with a telephone number where City can either communicate with the Contractor or leave messages at all times. The Contractor will return all calls no later than two hours after City leaves a message.

9. The Contractor warrants that the Contractor's product will meet City's specifications, mentioned above in Section A, Specifications. City will have the right to test Contractor's product at any time. Contractor will provide a sample from a delivered quantity of sodium hypochlorite solution at City's request. If the Contractor's Affidavit of Compliance or laboratory report or City's tests indicate that the Contractor's product does not meet City's specifications, City will have the right to require Contractor to pay for the testing of the sodium hypochlorite solution and the Contractor will not charge City for the load tested. The foregoing will not be construed to limit City's legal rights if the Contractor breaches a warranty.

10. The Contractor will ensure that the Contractor's subcontractors, including delivery contractors and delivery truck drivers, have read and understand these specifications.

11. City's payment of the fixed price will be considered payment for all of Contractor's obligations under this Contract. City has the right to reject Contractor's invoices that reflect pricing higher than the price bid and inserted herein.

12. The Contractor will send a current Safety Data Sheet (SDS) for the sodium hypochlorite solution by email to safetyteam@cleanwaterservices.org prior to commencing deliveries. Contractor will send a new SDS to City each time the SDS is updated.

III. COMPENSATION

A. Payment. The City shall compensate the Contractor on an as needed basis based on the itemized fixed rates specified in Exhibit A. The City agrees to pay the Contractor up to a maximum of $500,000.00 annually, excluding Gross Receipts Tax (GRT). The total compensation for this Contract, excluding GRT is $2,000,000.00.

B. The compensation represents a maximum amount. The Contractor must notify the City when the Services provided under this Contract approach 90% of compensation total. Services rendered beyond the maximum compensation amount will not be reimbursed unless the Contract is amended in writing prior to the provision of such services.

C. Invoicing and Payment Terms Payment will be made upon the City's acceptance of deliverables and receipt of a detailed, certified invoice from the Contractor. Payments will be sent to the Contractor's designated address. The City shall issue payment in accordance with the timelines required by law. Invoices must be submitted no later than fifteen (15) days after the Contract's termination. Late invoices will not be processed or paid.

IV. TERM

THIS CONTRACT SHALL NOT BECOME EFFECTIVE UNTIL APPROVED BY THE CITY. This contract shall terminate **four (4) years from date of final signature**. A contract for general services may not exceed ten (10) years, including all extensions and renewals, except as otherwise provided by NMSA 1978, Sections 13-1-150 through 13-1-152 or SFCC 1987, Section 11-13.

V. 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 sub-contractors due to any of the above, unless the City shall determine that the supplies or services to be furnished by the sub-contractor were obtainable from other sources in sufficient time to permit the Contractor to meet the required delivery scheduled. The rights and remedies of the City provided in this paragraph shall not be exclusive and are in addition to any other rights now being provided by law or under this contract.

VI. TERMINATION

A. Grounds. The City may terminate this Contract 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 Contract based upon the City's uncured, material breach of this Contract.

B. Notice: City Opportunity to Cure.

1. The City shall give the 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 Contract 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 Contract 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 Contract, the Contractor is

suspended or debarred by the City; or (iii) the Contract is terminated pursuant to the "Appropriations" Article of this Contract.

C. Liability. Except as otherwise expressly allowed or provided under this Contract, 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 Contract. 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 CONTRACT.*

VII. AMENDMENT

A. This Contract 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 the "Termination" Article herein, or to agree to the reduced funding.

VIII. STATUS OF CONTRACTOR

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

IX. 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.

X. 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.

XI. 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.

XII. INSPECTION OF PLANT

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

XIII. COMMERCIAL WARRANTY

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

XIV. CONDITION OF PROPOSED ITEMS

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

XV. RECORDS AND AUDIT

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

XVI. APPROPRIATIONS

The terms of this Contract, and any orders placed under it, 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, and any orders placed under it, shall terminate upon written notice being given by the City to the Contractor. The City's decision as to whether sufficient appropriations are available shall be accepted by the Contractor and shall be final. If the City proposes an amendment to the 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.

XVII. RELEASE

The Contractor, upon final payment of the amount due under this Contract, releases the City, its officers, and employees, from all liabilities, claims and obligations whatsoever arising from or under this Contract. 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.

XVIII. 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 prior written approval by the City.

XIX. CONFLICT OF INTEREST

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

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

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.

XX. APPROVAL OF CONTRACTOR REPRESENTATIVES

The City reserves the right to require a change in the Contractor's assigned representatives if they are not adequately serving the City's needs.

XXI. SCOPE OF CONTRACT; 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 the FY26-ITB-059 - Sodium Hypochlorite Supply and the Contractor's response to such document(s) are incorporated herein by reference and is included in the order of precedence.

XXII. NOTICE

The Procurement Code, 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 bribes, gratuities, and kickbacks.

XXIII. EQUAL OPPORTUNITY COMPLIANCE

The Contractor agrees to abide by all federal and state laws, and local Ordinances, pertaining to equal employment opportunity. In accordance with all such laws, rules, and regulations, the Contractor agrees to assure that no person in the United States shall on the grounds of race, religion, color, national origin, ancestry, sex, age, physical or mental handicap, or serious medical condition, spousal affiliation, sexual orientation or

gender identity, be excluded from employment with or participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity performed under this 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.

XXIV. INDEMNIFICATION

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

XXV. 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, NMSA 1978, Section 41-4-1, et. seq., 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.

XXVI. 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.

XXVII. LIMITATION OF LIABILITY

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

XXVIII. INCORPORATION BY REFERENCE AND PRECEDENCE

If this Contract has been procured pursuant to an Invitation to Bid, this Contract is derived from (1) the Invitation to Bid, (including any written clarifications to the Invitation to Bid and any City response to questions); (2) the Contractor's response to the Invitation to Bid.

In the event of a dispute under this Contract, applicable documents will be referred to for the purpose of clarification or for additional detail in the following order of precedence: (1) amendments to the Contract in reverse chronological order; (2) the Contract, including the scope of work and all terms and conditions thereof; (3) the Invitation to Bid, including attachments thereto and written responses to questions and written clarifications; and (4) the Contractor's response to the Invitation to Bid.

XXIX. 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.

XXX. INSPECTION

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

XXXI. INSPECTION OF SERVICES

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

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

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

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

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

1. require the Contractor to take necessary action(s) to ensure that future performance conforms to the requirements of this Contract; and

2. reduce the contract price to reflect the reduced value of the services performed.

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

1. by contract or otherwise, perform the services and charge to the Contractor any cost incurred by the City that is directly related to the performance of such service; or

2. terminate the contract for default.

XXXII. INSURANCE

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

A. COMMERCIAL GENERAL LIABILITY

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

B. BUSINESS AUTOMOBILE LIABILITY

insurance for all owned, non-owned vehicles, with a combined single limit not less than $1,000,000 per accident.

C. BROADER COVERAGE AND LIMITS

for 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.

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.

XXXIII. IMPRACTICALITY OF PERFORMANCE

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

XXXIV. 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.

XXXV. 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.

XXXVI. PATENT, COPYRIGHT AND TRADE SECRET INDEMNIFICATION

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

1. give the Contractor prompt written notice within 48 hours of any claim;

2. allow the Contractor to control the defense of settlement of the claim; and

3. cooperate with the Contractor in a reasonable way to facilitate the defense or settlement of the claim.

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

1. provide the City the right to continue using the product or service and fully indemnify the City against all claims that may arise out of the City's use of the product or service;

2. replace or modify the product or service so that it becomes non-infringing; or,

3. accept the return of the product or service and refund an amount equal to the value of the returned product or service, less the unpaid portion of the purchase price and any other amounts, which are due to the Contractor. The Contractor's obligation will be void as to any product or service modified by the City to the extent such modification is the cause of the claim.

XXXVII. SURVIVAL

The Contract paragraphs titled "Patent, Copyright, Trademark, and Trade Secret Indemnification; Indemnification; and Limit of Liability" shall survive the expiration of this Contract. Software licenses, leases, maintenance and any other unexpired Agreements that were entered into under the terms and conditions of this Contract shall survive this Contract.

XXXVIII. DISCLOSURE REGARDING RESPONSIBILITY

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

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

C. The Contractor shall provide immediate written notice to the City if, at any time during the term of this Contract, 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 Contract. However, the disclosure will be considered in the determination of the Contractor's responsibility and ability to perform under this Contract. Failure of the Contractor to furnish a disclosure or provide additional information as requested will be grounds for immediate termination of this Contract pursuant to the conditions set forth in the "Termination" Article of this Contract.

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 Contract. If during the performance of the contract, the Contractor is indicted for or otherwise criminally or civilly charged by any government entity (federal, state or local) with commission of any offenses named in this document the Contractor must provide immediate written notice to the City. If it is later determined that the Contractor knowingly rendered an erroneous disclosure, in addition to other remedies available to the Government, the City may terminate the involved contract for cause. Still further the City may suspend or debar the Contractor from eligibility for future solicitations until such time as the matter is resolved to the satisfaction of the City.

XXXIX. SUSPENSION, DELAY OR INTERRUPTION OF WORK

The City may, without cause, order the Contractor, in writing, to suspend, delay or interrupt the work in whole or in part for such period of time as the City may determine. The contract sum and contract time shall be adjusted for increases in cost and/or time associated with Contractor's compliance therewith. Upon receipt of such notice, Contractor shall leave the jobsite and any equipment in a safe condition prior to departing. Contractor must assert rights to additional compensation within thirty (30) days after suspension of work is lifted and return to work is authorized. Any compensation requested for which entitlement is granted and the contract sum adjusted, shall have profit included (for work completed) and for cost only (not profit) for Contractor costs incurred directly tied to the suspension itself and not otherwise covered by Contract remedy. Any change in Total Compensation must be reflected in an Amendment executed pursuant to the "Amendment" Article of this Contract.

XL. NOTIFICATION

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

To the City:	Department	To the Contractor:
Chief Procurement Officer purchasing@santafenm.gov PO Box 909 Santa Fe, NM 87504-0909	Wastewater Engineer Supervisor 73 Paseo Real Santa Fe, NM 87507 pfheerbrandt@santafenm.gov (505) 955-4623	PVS DX, INC. Alan Moss 3501 2nd Street SW Albuquerque, NM 87105 amoss@pvschemicals.com 505-3795830

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

XLI. SUCCESSION

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

The Rest of the Page is Intentionally Left Blank

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 J. Garcia, Mayor

CONTRACTOR:

Alan Moss
Alan Moss (May 6, 2026 15:31:55 MDT)

Alan Moss, Territory Manager

DATE: May 6, 2026

NMBTIN: 03642971006-GRT

ATTEST:

GERALYN CARDENAS, CITY CLERK

Approved to form and legal sufficiency by:

Marcos D. Martinez
Marcos D. Martinez (May 6, 2026 15:39:21 MDT)

MARCOS D. MARTÍNEZ, CITY ATTORNEY

APPROVED FOR FINANCES:

ANDREA PHILLIPS (May 15, 2026 15:46:46 MDT)

FINANCE DIRECTOR

Line	Description	Quantity	Unit of Measure	Unit Cost
1	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Base tier: 0–4,999 gallons per delivery)	1	Gallon	$3.20
2	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Tier 1: 5,000–9,999 gallons per delivery).	5000	Gallon	$3.20
3	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Tier 2: 10,000 gallons or more per delivery).	10000	Gallon	$3.20
4	Bulk Delivery Surcharge/Credit, if any, for Deliveries Under Minimum Drop Size (per delivery).	1	Each	$500.00
5	Delivery Charge for Off schedule or Emergency Deliveries (per delivery)	1	Each	$500.00
6	Delivery Charge for Refilling Totes at Site (Approx. 20 totes)	1	Each	$300.00

City of Santa Fe, NM
Purchasing
Travis Dutton-Leyda, Chief Procurement Officer
200 Lincoln Avenue, Santa Fe, NM 87501

EVALUATION TABULATION

ITB No. FY26-ITB-059

Sodium Hypochlorite Supply

RESPONSE DEADLINE: February 27, 2026 at 2:00 pm
Report Generated: Thursday, May 7, 2026

TABLE 1
Primary award cells are green and Backup award cells are gray

Line Item	Description	Quantity	Unit of Measure	Brenntag Pacific, LLC Unit Cost	PVS DX Unit Cost	Thatcher Company of Nevada, Inc Unit Cost
1	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Base tier: 0–4,999 gallons per delivery)	1	Gallon	$0.00	$3.20	$3.10
2	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Tier 1: 5,000–9,999 gallons per delivery).	5000	Gallon	$3.10	$3.20	$0.00
3	Sodium Hypochlorite, Bulk Delivery, FOB City Storage Tank – Unit Price Per Gallon (Tier 2: 10,000 gallons or more per delivery).	10000	Gallon	$0.00	$3.20	$0.00
4	Bulk Delivery Surcharge/Credit, if any, for Deliveries Under Minimum Drop Size (per delivery).	1	Each	$0.00	$500.00	$0.00
5	Delivery Charge for Off-schedule or Emergency Deliveries (per delivery)	1	Each	$1,500.00	$500.00	$0.00
6	Delivery Charge for Refilling Totes at Site (Approx. 20 totes)	1	Each	$750.00	$300.00	$0.00

VENDOR QUESTIONNAIRE PASS/FAIL

Question Title	Brenntag Pacific, LLC	PVS DX	Thatcher Company of Nevada, Inc
Financial Interest	Pass	Pass	Pass
Specify by name	No Response	No Response	No Response
NM Gross Receipts Tax # (NMBTIN)	Pass	Pass	Pass
Payment Terms	Pass		Pass
Contractor's Delivery	Pass	Pass	Pass
Preference			

Date: April 30, 2026

To: Michael J. Garcia, Mayor and Finance Committee and Governing Body

Via: Andrea K. Phillips, Deputy City Manager

From: Terry Lease, Manager, Asset Development

Nina A. Nguyen, Project Manager, Asset Development

Subject: Real Estate Donation Agreement between City of Santa Fe and Supreme Court Building Commission of the State of New Mexico

---

ITEM AND ISSUE:
Asset Development respectfully requests your review and approval of the Real Estate Donation Agreement between the City of Santa Fe ("City") and The Supreme Court Building Commission of the State of New Mexico ("Commission"); (Terry Lease, tjlease@santafenm.gov, (505) 629-2206, Nina A. Nguyen, nanguyen@santafenm.gov, (505) 819-1870)

BACKGROUND AND SUMMARY:
City may donate any City-owned real estate to the State without violating the Anti-Donation Clause of the New Mexico Constitution. Commission has requested that City donate the public alley (the "Alley") located on the north side of East De Vargas Street, adjacent to and east of the Supreme Court building to the Commission for the purpose of enhancing security of the Supreme Court building, its judges, staff, and invitees. City Staff has assessed the Commission's request and the Alley and has determined that the City has no plans for the Alley and the conveyance of the Alley to the Commission would not affect the community adversely, so long as an easement is granted to the two properties on the east side of the Alley (127 and 129 E. De Vargas) for access and underground utilities and provided a utility easement is reserved by City. A City-approved appraiser, American Property Consultants and Appraisers, Inc. performed an appraisal of the Alley, and determined that the fair market value of the Alley is $69,000.00. Upon approval of this Agreement by the Governing Body, the City is prepared to execute the Quitclaim deed, conveying the Alley to Commission as a donation.

City Council

Alma G. Castro, District 1
Patricia Feghali, District 1
Elizabeth "Liz" Barrett, District 2
Paul C. Bustamante, District 2
Lee Garcia, Mayor Pro Tem, District 3
Pilar F.H. Faulkner, District 3
Jamie Cassutt, District 4
Amanda Chavez, District 4

PRIOR APPROVALS AND SUPPORTING INFORMATION:

FUNDING SOURCE:

$$$$$ SOURCE/REVENUE: ☐**Expense** ☐**Revenue**

Munis Org Name/Number: None/Donation

Munis Object Name/Number:

Budget Officer / Designee: Andy Hopkins **Date:** 05/01/2026

Budget Officer Comment/Exceptions: _____

PROCUREMENT METHOD:

The procurement method used was NMSA 1978, Section 13-1-98, Exempt

Real Property is exempt from Procurement

Chief Procurement Officer (CPO) / Designee: **N/A - Exempt** **Date:** _____

CPO Comment/Exceptions: _____

ASSOCIATED APPROVALS:

IT Components included? ☐ **Yes** | ☒ **No**

Approval: _____ **Title:** _____ **Date:** _____

Comment/Exceptions: _____

Vehicles included? ☐ **Yes** | ☒ **No**

Approval: _____ **Title:** _____ **Date:** _____

Comment/Exceptions: _____

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

Approval: _____ **Title:** _____ **Date:** _____

Comment/Exceptions: _____

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

If yes, what is the issuing agency: _____

Approval: _____ **Title:** _____ **Date:** _____

Comment/Exceptions: _____

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

Project Ledger Number: _____

Approval: _____ **Title:** _____ **Date:** _____

Comment/Exceptions: _____

ATTACHMENTS:

Donation Agreement
NMDFA Approval
Real Property Determination
Confirmation of One Committee Meeting for GB Approval

REAL ESTATE DONATION AGREEMENT

This REAL ESTATE DONATION AGREEMENT ("**Agreement**") is made and entered into as of the date of the last signature below ("**Effective Date**") by and between the CITY OF SANTA FE, a municipality chartered under the laws of New Mexico, ("**City**" or "**Donor**") and the SUPREME COURT BUILDING COMMISSION OF THE STATE OF NEW MEXICO ("**Commission**" or "**Donee**"), collectively the "**Parties**".

RECITALS

WHEREAS, a City may donate any City-owned real estate to the State without violating the Anti-Donation Clause of the New Mexico Constitution. (N.M. Const., art. IX, § 14); and

WHEREAS, the City may donate land to the State, consistent with NMSA 1978, section 3-54-2(D), if it is in the best interest of the public and approved by the department of finance and administration; and

WHEREAS, the Commission has requested that the City donate the public alley located on the north side of East De Vargas Street, adjacent to and east of the Supreme Court building, more particularly described in **Exhibit A**, attached hereto and incorporated herein (the "**Alley**"), to the Commission for the purpose of enhancing security of the Supreme Court building, its judges, staff and invitees; and

WHEREAS, City staff has assessed the Commission's request and the Alley and has determined that the City has no plans for the Alley and that conveyance of the Alley to the Commission would not affect the community adversely, so long as an easement is granted to the two properties on the east side of the Alley (127 and 129 E. De Vargas) for access and underground utilities and provided a utility easement is reserved by the City; and

WHEREAS, a City-approved appraiser, American Property Consultants and Appraisers, Inc., performed an appraisal of the Alley , and determined that the fair market value of the Alley is $69,000; and

WHEREAS, upon approval of this Agreement by the Governing Body, the City is prepared to execute the quitclaim deed included as **Exhibit B,** attached hereto and incorporated herein, conveying the Alley to the Commission as a donation (the "**Quitclaim Deed**"); and

WHEREAS, upon recordation of the quitclaim deed, the Commission is prepared to apply for City approval of a lot consolidation plat consolidating the Alley with the Commission-owned property adjacent to the west (the "**Lot Consolidation Plat**"); and

WHEREAS, upon City approval of the Lot Consolidation Plat, the Commission is prepared to record the easement for access and underground utilities in favor of the 127 and 129 E. De Vargas properties adjacent to the Alley on the east as set forth in **Exhibit C**, attached hereto and incorporated herein (the "**Easement**"); and

WHEREAS, this is an "arm's length" transaction, and no identity of interest exists between the City and the Commission, their staff, or officials; and

WHEREAS, the Commission acknowledges that the City has no obligation or responsibilities with regard to the Alley or its future use other than the conveyance to the Commission.

Now, therefore, it is agreed as follows:

1. EFFECTIVE DATE

The date upon which this Agreement shall be finally executed by the authorized representative of the City and the Commission shall be the effective date ("Effective Date") hereof.

2. **REQUIREMENTS OF COMMISSION**

The City hereby agrees to donate and convey to the Commission and the Commission hereby agrees to accept the donation and conveyance from the City, and the Commission agrees to complete the following conditions within one (1) year of the Effective Date:

a. Following recordation of the Quitclaim Deed, the Commission shall successfully obtain approval of the Lot Consolidation Plat from the City's Land Use Department or other required City entity and shall record the Lot Consolidation Plat with the Santa Fe County Clerk;

b. Following recordation of the Lot Consolidation Plat, the Commission shall execute and record the Easement with the Santa Fe County Clerk.

3. **ACTIONS OR SUITS**

The City warrants and represents that there are no actions or suits in law or equity or proceedings by any government agency now pending or, to the knowledge of the City, threatened against the City in connection with the Alley, and there is no outstanding order, writ, injunction, or decree of any court or governmental agency affecting the Alley.

4. **PROFFERS AND COMMITMENTS**

The City represents that there has not been made and will not be made, without the Commission's prior written consent, any proffers or other commitments relating to the Alley, which would impose any obligation on the Commission, prior to execution and delivery of the Quitclaim Deed to the Commission, to make any contribution of money or dedications of land or to construct, install, or maintain any improvements of a public or private nature with respect to the Alley.

5 **OTHER AGREEMENTS**

The City warrants and represents that the execution and delivery of this Agreement, the completion of the conveyances contemplated hereby, and the fulfillment of the terms hereof will not result in a breach of any of the terms or provisions of, or constitute a default under, or conflict with, any agreement, indenture, or other instrument to which the City is a party or by which it or the Alley is bound, or any judgment, decree, order or award of any court, governmental body, or arbiter, or any law, rule, regulation applicable to the City.

6. **SETTLEMENT**

Settlement and delivery to the Commission of the executed Quitclaim Deed by the City shall be within fifteen (15) business days of the Effective Date.

7. TITLE

The Alley shall be conveyed free from all mortgages, deeds of trust, liens, security interests, and other financial encumbrances.

8. EXPENSES

The Commission shall pay for its own attorney's fees, all document preparation fees and recording fees and all fees and costs associated with the Lot Consolidation Plat.

9. USE OF ALLEY

The Commission shall use the Alley solely for the purposes of providing pedestrian and vehicular access to the Supreme Court building and the 127 and 129 E. De Vargas properties and for underground utilities as provided for in the Easement.

10. DEFAULT

In the event of any default, the non-defaulting party shall be entitled to pursue any remedies at law or in equity in connection with the default of the other Party.

11. PRIOR AGREEMENTS/MERGER

This Agreement supersedes any and all prior understandings and agreements between the Parties regarding the subject matter and constitutes the entire agreement between them. No representations, warranties, conditions, or statements, oral or written, not contained herein shall be considered a part hereof. This Agreement may not be amended, altered, or modified except by an instrument in writing signed by the Party sought to be charged therewith.

12. NOTICES

Any notices required or permitted to be given hereunder shall be deemed to have been properly given if sent by United States or certified or registered mail, return receipt requested, postage prepaid, or if delivered in hand, as follows:

If delivered or mailed to:

City:	City of Santa Fe Attn: City Attorney's Office PO Box 909 Santa Fe, NM 87504-0909
With a copy to:	City of Santa Fe Attn. Asset Development Manager PO Box 909 Santa Fe, NM 87504-0909
Commission:	Sommer Karnes & Associates, LLP PO Box 2476 Santa Fe, NM 87504 3

With a copy to: Clerk of the New Mexico Supreme Court
PO Box 848
Santa Fe, NM 87504

13. **GOVERNING LAW**

Notwithstanding the place where this Agreement may be executed by any of the Parties hereto, the Parties expressly agree that all terms and provisions hereof shall be construed and enforced in accordance with the laws of the STATE OF NEW MEXICO.

14. MISCLELLANEOUS

Subject to the provisions hereof, this Agreement shall bind and inure to the benefit of the Parties hereto, their heirs, personal representatives, successors and permitted assigns. No assignment of this Agreement shall be permitted except with the written consent of the other Party, which consent shall not be withheld unreasonably. The warranties, representations and terms of this Agreement shall survive delivery of the executed Quitclaim Deed and shall not be merged therein.

15. **EXECUTION OF CONVEYANCE**

The approval and execution of this Agreement grants the authority to fully execute the conveyance of the Alley via Quitclaim Deed by the Mayor.

[REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY]
[SIGNATURES APPEAR ON THE FOLLOWING PAGE]

IN WITNESS WHEREOF, the Parties have effectively executed this Agreement as of the date of their last signature below.

DONOR: CITY OF SANTA FE

MICHAEL GARCIA, MAYOR

DATE:_____

DONEE: SUPREME COURT BUILDING COMMISSION OF THE STATE OF NEW MEXICO

DAVID K. THOMSON, CHIEF JUSTICE

DATE: 4/29/26

ATTEST:

GERALYN CARDENAS, CITY CLERK

APPROVED AS TO FORM FOR LEGAL SUFFICIENCY:

Marcos D. Martinez
Marcos D. Martinez (Apr 28, 2026 15:58:44 MDT)

MARCOS MARTINEZ, CITY ATTORNEY

APPROVED AS TO FINANCE:

ANDREA PHILLIPS, INTERIM FINANCE DIRECTOR
NO FUNDS ACCOUNT – DONATION

[REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY]

EXHIBIT "C"

Grant of Easement for Ingress, Egress and Private Utilities

This Grant of Easement for Ingress, Egress and Private Utilities (the "Grant of Easement") is made this ___ day of _____, 2026, by the Supreme Court Building Commission of the State of New Mexico ("Grantor") in favor of the real property owned by Mary Catherine Casey and Cynthia Robin Connell, a.k.a. C. Robin Connell, as trustees of the Casey-Connell Revocable Trust under a Trust Agreement dated June 29, 2022, whose address is 1712 Vassar Dr. SE, Albuquerque, NM 87106, ("Grantee 1") and Galisteo Street II, Inc., the address of which is 224 Galisteo Street, Santa Fe, NM 87501 ("Grantee 2").

Recitals:

1. Grantor owns that certain real property in Santa Fe County, New Mexico commonly known as 237 Don Gaspar Avenue and more particularly described in Exhibit 1, attached hereto and incorporated herein (the "Grantor Property").

2. Grantee 1 owns that certain real property in Santa Fe County, New Mexico commonly known as 127 East De Vargas Street and more particularly described in Exhibit 2, attached hereto and incorporated herein ("Tract B").

3. Grantee 2 owns that certain real property in Santa Fe County, New Mexico commonly known as 129 East De Vargas Street and more particularly described in Exhibit 3, attached hereto and incorporated herein ("Tract A").

4. Mary Catherine Casey and Cynthia Robin Connell, a.k.a. C. Robin Connell, as trustees of the Betty R. Caldwell Revocable Trust dated 7/29/96 executed that certain Amended and Restated Reservation of Easements (the "Reservation of Easements") filed for record as Instrument No. 1974016, on December 9, 2021 of the records of Santa Fe County, New Mexico, with respect to Tract A and Tract B, by which the grantor granted and reserved certain access and utility easements between Tract B and Tract A, as shown on the Amended Boundary Survey Plat filed for record as Instrument No. 1974367 on December 14, 2021 in Book 885 at Page 42 of the records of Santa Fe County, New Mexico (the "Amended Boundary Survey").

5. Grantor desires to grant Grantee 1 and Grantee 2 an easement for ingress and egress limited in scope as defined herein and private utilities across and along a portion of the easterly boundary of the Grantor Property as more particularly shown on Exhibit 4 and as described therein.

Grant of Easement

By this instrument, Grantor grants the following easement:

A. Grant of Easement. Grantor hereby grants an easement for ingress and egress and installation, maintenance and repair of private underground utilities across, beneath and along the eastern boundary of the Grantor Property for the benefit of Tract A and Tract B as more

particularly shown on Exhibit 4 and described therein (the "Easement") on the terms and conditions contained herein.

B. Purpose of Easement. The purposes of the Easement are to maintain the historic and current use of the alley within the Easement area by allowing Grantee 1 to access Tract B and continue complying with Grantee 1's obligations under the Reservation of Easements, allowing Grantee 2 to access Tract A via Tract B and also creating a private underground utility easement in favor of Tract A and Tract B.

C. Scope of Easement. Use of the Easement is limited to vehicular access to the existing parking spaces on Tract B west and south of the existing buildings and to vehicular access to Tract A via Tract B. Parking within the Easement is prohibited.

Use of the Easement for private underground utilities is subject to the following:

1. Installation of underground utilities within the Easement is allowed once, shall be at the sole cost of the acting owner and all required City of Santa Fe and any other government approvals shall be obtained prior to the commencement of underground utility installation work. No above-ground utilities may be placed within the Easement. The acting owner shall provide notice to the non-acting owner and Grantor prior to making any application to the City and the non-acting owner and Grantor shall be allowed to tap into any underground utilities installed within the Easement.

2. Installation of underground utilities within the Easement may not take place during the Legislative session, shall be completed as soon as practicable following commencement of work and shall not take longer than 20 calendar days to complete, as documented by the contractor's schedule. The acting owner shall provide to Grantor written notice of the planned utility installation prior to applying to the City for approval of such work and, not less than 10 calendar days prior to initiation of work, a copy of the contractor's schedule and the governmental approvals. The acting owner shall provide to Grantor written notice of any intended maintenance or repair work not less than 48 hours prior to carrying out such work.

3. Following any underground utility installation, the acting owner shall repave the entire width of the easement for the length of the underground utility installation. For any maintenance or repair work, the acting owner shall restore all disturbed areas within the Easement to their prior condition, to the extent practicable.

D. Improvement and Maintenance. Grantee 1 and Grantee 2 may carry out maintenance and repair of the surface of the Easement only in accordance with a validly issued development permit from the City of Santa Fe, paid for solely by the acting owner in a timely fashion to avoid the placement of any materialmen's liens upon the Grantor Property. Grantor may carry out maintenance and repair of the surface of the Easement pursuant to a validly issued development permit from the City of Santa Fe and may install an automatic gate across the Easement at its own cost, subject to satisfaction of any requirements of the City of Santa Fe with respect to emergency access, provision of an access code to Grantee 1 and Grantee 2 and maintenance of vehicular access to the existing parking space at the southwest corner of Tract A.

Grantor may also remove the existing pedestrian gate at the north end of the Easement at its sole discretion or may lock said gate subject to provision of a key or access Code to Grantee 1 and Grantee 2.

E. Indemnity. Any damage to property subject to the Easement resulting from the negligence or misconduct of Grantee 1 or Grantee 2 shall be promptly paid at the sole cost and expense of the owner causing such damage. In the event the party causing such damage does not pay, then Grantor may carry out necessary improvements and shall be entitled to repayment by the owner causing such damage.

F. Binding Effect. The Easement shall run with the land, shall burden the Grantor Property and benefit Tract A and Tract B and shall be binding upon and inure to the benefit of the heirs, successors, assigns, grantees, and lessees of the owners of the Grantor Property, Tract A and Tract B.

G. Governing Law. This Grant of Easement shall be governed by the laws of the State of New Mexico.

H. Amendment. Any amendment to this Grant of Easement must be in writing and executed by the owners of the Grantor Property, Tract A and Tract B.

[*Signatures and acknowledgments on following pages*]

IN WITNESS WHEREOF, this Grant of Easement has been executed on the day and year first set forth above.

GRANTOR:

Supreme Court Building Commission of the State of New Mexico

_____
David K. Thomson, Chief Justice of the
New Mexico Supreme Court and Chair
of the Supreme Court Building Commission

The foregoing Grant of Easement was acknowledged before me by David K. Thomson in his Capacities as Chief Justice of the New Mexico Supreme Court and Chair of the Supreme Court Building Commission on this ___ day of _____ 2026.

_____
Notary Public/Notarial Officer
My commission expires: _____

Exhibit 1

Grantor Property

Insert Legal description for recorded Lot Consolidation Plat

EXHIBIT 2

Grantee 1 Property

Tract B, within projected Section 24, T. 17 N., R. 9 E., N.M.P.M. within the Santa Fe Grant, City of Santa Fe, Santa Fe County, New Mexico and being further described as follows:

COMMENCING at a Sanitary Sewer Manhole No. 7, Line V lying in East De Vargas Street, thence,

N 64°05'05" E a distance of 11.29 feet to a point; thence,
N 12°58'36" E a distance of 71.28 feet to a point; thence,
N 12°52'20" E a distance of 69.68 feet to a1/2" rebar and cap, PS 4070, and the POINT OF BEGINNING, thence,

N 12°52'20" E a distance of 88.25 feet to a 1/2" pipe; thence,
S 85°45'23" E a distance of 69.02 feet to a 3/4" pipe; thence,
S 89°26'37" E a distance of 32.63 feet to a point; thence,
in a southeasterly direction with a curve turning to the right with a radius of 12.30 feet, having a chord bearing of S 37°53'33" E and a chord distance of 19.27 feet, a central angle of 103°06'08" and an arc length of 22.13 feet to a point; thence,
S 13°39'31" W a distance of 90.41 feet to a 1/2" CIP, PS 4070, thence,
N 80°37'42" W a distance of 48.72 feet to a 1/2" pipe; thence,
N 77°07'40" W a distance of 65.18 feet to the POINT OF BEGINNING.

All as shown on a plat entitled "Amended Boundary Survey Plat for the Betty R. Caldwell Revocable Trust" recorded December 14, 2021 in Plat Book 885, page 042 as Instrument No. 1974367.

EXHIBIT 3

Grantee 2 Property

Tract A as shown and delineated on plat of survey entitled "Amended Boundary Survey Plat for the Betty R. Caldwell Revocable Trust, Tract A and Tract B, within projected Section 24, T17N, R9E, NMPM, Santa Fe, Santa Fe County, New Mexico, 127-129 East De Vargas Street" dated December 14, 2021 and recorded December 14, 2021 as Instrument No. 1974367 in Plat Book 885 at Page 42, records of Santa Fe County, New Mexico

EXHIBIT 4

Legal Description of Access Easement

Legal Description
of
Alley

A parcel of land located within the City of Santa Fe, County of Santa Fe, State of New Mexico in Section 24, T. 17 N., R. 9 E., N.M.P.M. as projected into the Santa Fe Grant and being further described as follows:

BEGINNING at the southeast corner of the parcel herein described, being the identical southwest corner of Tract A as shown in Plat Book 885, page 042, marked by a metal plug in the curb, from whence a sanitary sewer manhole No. 7, Line V, lying in East De Vargas Street bears: S 64°05'05" W 11.29 feet, thence from said point of beginning along the south side of the herein described alley:

N 70°12'01" W a distance of 10.00 feet to a calculated point, said point being and intended to be the southeast corner of Lot 12, Block 53 of the Official Kings Map of the City of Santa Fe as shown in Plat Book 9, page 186 and the southwest corner the alley herein described, thence, along the common line of Lot 12, Block 53 and the west side of the alley;

N 12°54'55" E a distance of 226.50 feet to a calculated point, being the northeast corner of said Lot 12, Block 53 and the northwest corner of the alley herein described and the south boundary of the Santa Fe River Park, thence along the north side of the ally and the south boundary of the Santa Fe River Park;

S 85°45'23" E a distance of 10.00 feet to a ½" pipe marking the northeast corner of the alley and the northwest corner of Tract B as shown in Plat Book 885, page 042, thence along the common line of the alley and Tract B:

S 12°52'20" W a distance of 88.25 feet to a ½" capped iron pin, P.S. 4070 marking the common corner of Tract A and Tract B, as shown in Plat Book 885, page 042, thence continuing along said common line of Tract A and the alley;

S 12°52'20" W a distance of 69.68 feet to a ½" capped iron pin, P.S. 9052, thence continuing along said common line of Tract A and the alley;

S 12°58'36" W a distance of 71.28 feet to the place and point of BEGINNING.

NOTES

1.) Basis of bearing for this legal description was taken from the west boundary of Tract A and Tract B as shown in Plat Book 885, page 042.

2.) Plat reference;
a.) Lot 12, Block 53 of the Official Kings Map of the City of Santa Fe as shown in Plat Book 9, page 186.
b.) Lot Line Adjustment, 129 East De Vargas Street, recorded in Plat Book 193, pages 2-4.

DAVID E. COOPER
NEW MEXICO
9052
PROFESSIONAL SURVEYOR

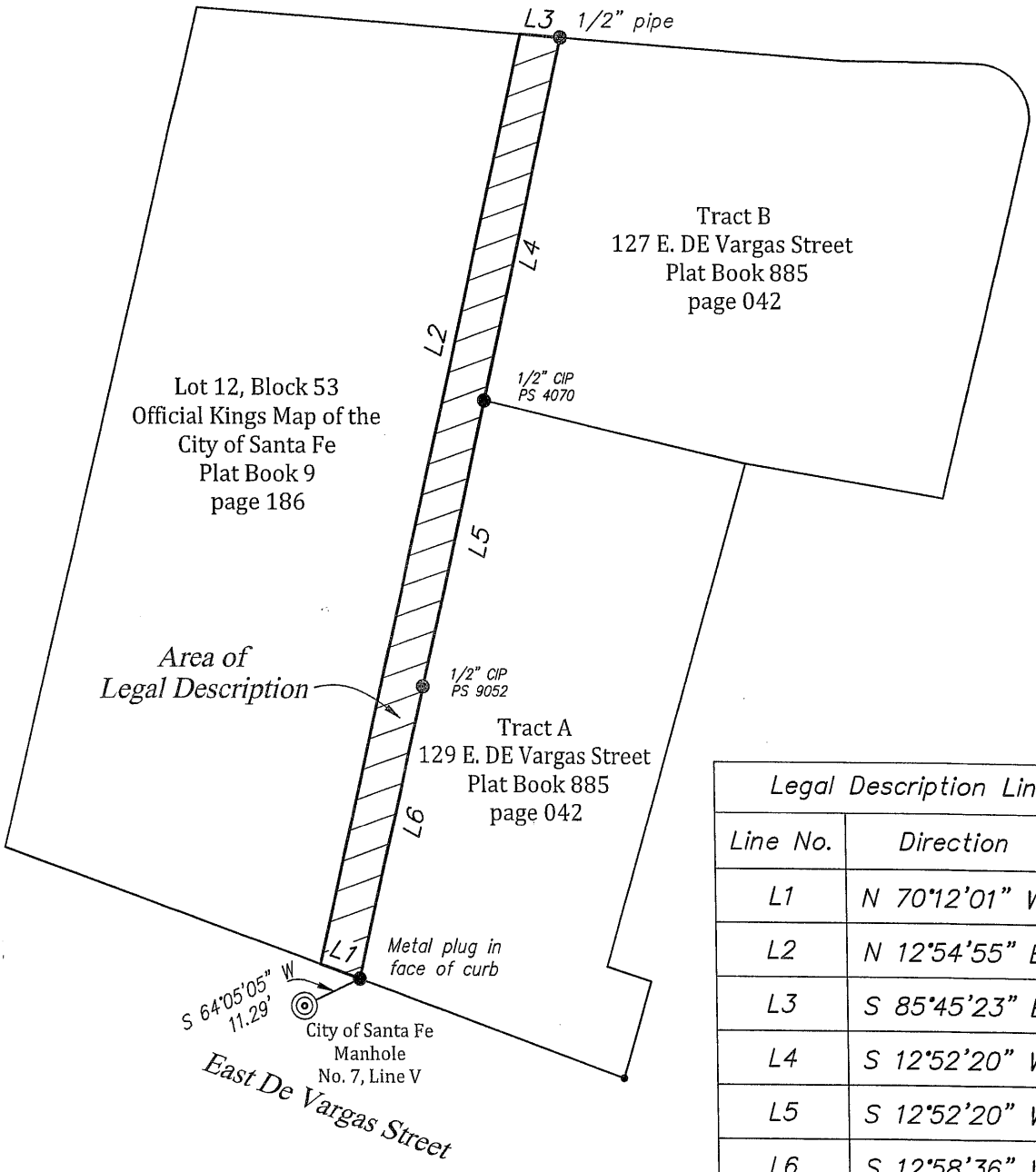
I, David E. Cooper, a duly licensed Professional Surveyor in the State of New Mexico hereby certify that this Legal Description represents an actual survey made in the field by me or under my direction and the documents noted hereon, that it meets the Minimum Standards for Surveys in New Mexico and that the information contained herein is true and correct to the best of my knowledge, information and belief.

David E. Cooper *P.S. No. 9052*

Sierra Land Surveying, Inc.
1452 South St. Francis Drive
Santa Fe New Mexico
505-983-5932
Email: sls@ SierraLandSurveys.com

Sierra Proj. No. LG-020-0421
Date: September 22, 2025

State of New Mexico



Legal Description Line Table		
Line No.	Direction	Length
L1	N 70°12'01" W	10.00'
L2	N 12°54'55" E	226.50'
L3	S 85°45'23" E	10.00'
L4	S 12°52'20" W	88.25'
L5	S 12°52'20" W	69.68'
L6	S 12°58'36" W	71.28'

DAVID E. COOPER
NEW MEXICO
9052
PROFESSIONAL SURVEYOR

Sierra Land Surveying, Inc.
1452 South St. Francis Drive
Santa Fe New Mexico
505-983-5932
Email: sls@ SierraLandSurveys.com

Sierra Proj. No. LG-020-0421
Date: September 22, 2025

Docusign Envelope ID: DD637401-201C-82B2-83CF-F8F8CF2AA822

New Mexico
Department of Finance
and Administration

407 Galisteo St,
Santa Fe, NM 87501
(505) 827-4985

Cabinet Secretary Wayne Propst

Governor Michelle Lujan Grisham

SENT VIA ELECTRONIC MAIL MESSAGE (bjmoya@santafenm.gov)

Date: April 29, 2026

To: Interim City Manager Brian Moya
City of Santa Fe
200 Lincoln Avenue,
Santa Fe, New Mexico 87501

Re: Approval of No-Consideration Conveyance of Alley to the Supreme Court Building Commission

Dear Mr. Moya:

The Local Government Division (LGD) of the Department of Finance and Administration (DFA), acting under NMSA 1978, Section 13-6-2, has reviewed the City of Santa Fe's request for approval to donate a strip of real property to the Supreme Court Building Commission.

Based on the City's submission, LGD confirms the following:

1. Governmental purpose and public safety/security. The City represents that the donation advances a documented public safety and security objective by restricting public access through a ten-foot-wide public alley adjacent to state judicial facilities and employee parking, thereby enabling the Commission to take steps to secure the area.
2. Eligible recipient and alignment with statutory mission. The proposed recipient, the Supreme Court Building Commission, is an agency of the State of New Mexico created under NMSA § 34-3-1 (1978) and is responsible for the Supreme Court Building.
3. Identified the asset and its valuation. The asset is a ten-foot-wide alley, comprising 1,579 square feet, extending north from East De Vargas Street between Don Gaspar Avenue and Old Santa Fe Trail, adjacent to the eastern boundary of the Supreme Court Building property. The alley has been appraised at $69,000, and the appraisal was provided to the City.
4. Action by the local governing body is calendared. The City Council is set to consider the donation on May 13, 2026.

Conclusion and Approval

Subject to final approval by the City's governing body and compliance with all applicable statutory and charter requirements, LGD hereby approves the City's proposed no-consideration conveyance of the identified alley to the Supreme Court Building Commission pursuant to NMSA 1978, Section 13-6-2. This approval is limited to the transaction described above and is conditioned on:

1. City Council approval on the date calendared or on such later date as the Council may lawfully act;
2. Execution of instruments that accurately describe the property as identified in the City's submission; and
3. Retention of the appraisal and governing body action in the City's records.

Please provide LGD with a copy of the final Council resolution or ordinance authorizing the conveyance and the fully executed conveyance instrument upon completion.

Docusign Envelope ID: DD637401-201C-82B2-83CF-F8F8CF2AA822

New Mexico
Department of Finance
and Administration

407 Galisteo St,
Santa Fe, NM 87501
(505) 827-4985

Cabinet Secretary Wayne Propst

Governor Michelle Lujan Grisham

If you have any questions, please contact LGD Deputy Division Director Renee Ward at Renee.Ward@dfa.nm.gov.

Regards,

Signed by:
6EB4D958A89A432...
Wayne Propst
Cabinet Secretary

cc: George Hypolite, General Counsel, DFA; Marcos Martinez, City Attorney, Santa Fe; Karl H. Sommer, Counsel for Supreme Court Building Commission

City of Santa Fe, New Mexico

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

Alan Webber, Mayor

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

Dear City Staff,

In accordance with State Statute and City Ordinances, this document serves as a blanket ***services'*** determination and is valid until June 30, 2026, for the types of general, professional, and construction services that are clearly one of the types pre-established and approved by the State Purchasing Agent and City CPO.

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

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

The following are General Services:

- Air/bus, vehicle charter/rental service
- Animal/k9 boarding - basic
- Auctioneers
- Audio-visual equipment setup and routine maintenance for events and presentations (including projectors, microphones, and speakers)
- Automotive mechanical services – all - including vehicle inspection, diagnostics, repair labor, parts replacement, and routine maintenance (e.g., oil changes, brake service, tune-ups, etc.)
- Banking Services (routine, transaction-based)
- Boiler testing/water treatment service
- Bookkeeping service (routine, transaction-based)
- Biohazard clean-up and disinfection services for crime scenes, homicides, suicides, unattended deaths, car accidents, deadly car crashes and cleanup of police units, along with any other biohazard situations. Building alarm systems, service and repair
- Check collection service
- Clothing, textile fabrication repair service

General Services (continued):

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

General Services (continued):

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

The following are Professional Services:

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

Professional Services (Continued):

- Insurance Adjusters/Brokers
- Investigators (personnel-related, etc.)
- Investment advisors and management
- Labor negotiators
- Landscape Architects
- Lawyers
- Lobbyists
- Managed Network Services
- Management and system analysts
- Management consultants
- Marketing consultants (including identifying market opportunities, conduct of marketing programs, planning, promotion, market research surveys, etc.)
- Medical arts practitioners
- Medical – doctors, immunizations, etc.
- Mental health support – Therapists, Counselors, etc.
- Network Cybersecurity Services
- Network Installation
- Physicals
- Planners
- Policy Advisors
- Polygraph services
- Product Development Services
- Program/Project Managers
- Psychologists
- Public relations advisors/Publicists
- Publication development (creation of audio/video productions, brochures, pamphlets, maps, signs, posters, annual reports, etc.)
- Researchers
- Scientists (Bio/Chem/Env/Geo/Hydro/Mech, etc.)
- Social and Human Services - Includes case management, outreach, crisis intervention, supportive housing assistance, and other services intended to support vulnerable or at-risk populations. Services may be delivered by licensed or trained professionals in coordination with public or nonprofit systems.

Professional Services (Continued):

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

The following are Construction Services:

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

Travis Dutton-Leyda, Chief Procurement Officer

_____ Date: 06/30/2025

Emily Oster, Finance Director

Emily K. Oster _____ Date: 06/30/2025

NGUYEN, NINA A.

From: MARTINEZ, MARCOS D.
Sent: Tuesday, April 28, 2026 2:59 PM
To: HARDING, MATTHEW R.; NGUYEN, NINA A.
Cc: LEASE, TERRY J.
Subject: Re: Supreme Court Alley

That is fine. An approval by the GB only needs to go to one committee.

Marcos Martínez
City Attorney's Office
City of Santa Fe

This message may be subject to the attorney client privilege. 11-503 NMRA. If you have received this message in error, please delete it and alert the sender. 16-404(B) NMRA.

From: HARDING, MATTHEW R. <mrharding@santafenm.gov>
Sent: Tuesday, April 28, 2026 2:57 PM
To: NGUYEN, NINA A. <nanguyen@santafenm.gov>
Cc: LEASE, TERRY J. <tjlease@santafenm.gov>; MARTINEZ, MARCOS D. <mdmartinez@santafenm.gov>
Subject: RE: Supreme Court Alley

Hi Marcos,

Can you answer Nina's question:

"The letter from NMFDA should be coming within the next week or so.

Will Marcos approve this so we can get it on the GB for 05/13/2026? I believe that Marcos did approve us going to only Finance and GB, not requiring PW & U, correct?"

Thanks!

Matt Harding
Administrative Manager
City Attorney's Office
City Hall | 200 Lincoln Avenue
Santa Fe, New Mexico 87501
Office: (505) 955-6528
Cell: (505) 637-1518
mrharding@santafenm.gov

CITY OF SANTA FE

Signature: Terry Lease
Terry Lease (May 1, 2026 07:38:13 MDT)

Email: tjlease@santafenm.gov

Signature:
ANDREA PHILLIPS (May 1, 2026 16:28:53 MDT)

Email: akphillips@santafenm.gov

DATE: May 5, 2026
TO: Governing Body
VIA: Sam Burnett, Interim Public Works Department Director JOHN BURNETT (May 7, 2026 07:28:19 MDT)
FROM: Gabrielle Chavez, Transit Director of Administration Gabrielle Chavez (May 6, 2026 14:22:07 MDT)
REVIEWED BY: Carol Swenson, PW Business Operations Manager YVONNE SWENSON (May 6, 2026 14:20:46 MDT)
SUBJECT: FY23 FTA Section 5307 Operating Assistance Grant

ACTION:
Request for Approval of Grant Agreement (FTA G-34) with the U.S. Department of Transportation, via the Section 5307 Operating Assistance Formula Grant program in the Total Amount of $2,167,799. (Gabrielle Chavez, Transit Director of Administration; gnchavez@santafenm.gov)

1. Request for Approval of a Budget Adjustment Request (BAR) in the Total Amount of $2,167,799 from the FTA Grant to Transit Revenue and Expenses.

BACKGROUND/SUMMARY:
The City has been awarded an FTA Award, identified as FY2023 Section 5307 Operating Formula Funding for FY25 and FY26 Operating Assistance by FTA. The purpose of the grant is to provide operating assistance for fixed route service by reimbursing salaries and benefits for the City of Santa Fe's Transit operations. There is a 50 percent Local match requirement of which is provided by Transit's FY26 and FY27 Operating Budget.

FUNDING SOURCE: FTA Section 5307 Grant ID: NM-2026-006
Munis Project Ledger ID: TAD2654007
Munis Fund Name/Number: Transit/540
Munis Org Name/Number: Transit Operations/5400491
Munis Revenue Obj Name/Number: US DOT/490550
Munis Expenditure Obj Name/Number: Various Transit Operating

Attachments:
FTA Grant Agreement
Project Ledger ID Form
Budget Adjustment Request (BAR)

ERIKA LUJAN
ERIKA LUJAN (May 8, 2026 10:58:17 MDT)

City Council

Alma G. Castro, District 1
Patricia Feghali, District 1
Elizabeth "Liz" Barrett, District 2
Paul C. Bustamante, District 2
Lee Garcia, Mayor Pro Tem, District 3
Pilar F.H. Faulkner, District 3
Jamie Cassutt, District 4
Amanda Chavez, District 4

UNITED STATES OF AMERICA
DEPARTMENT OF TRANSPORTATION
FEDERAL TRANSIT ADMINISTRATION

GRANT AGREEMENT
(FTA G-34)

On the date the authorized U.S. Department of Transportation, Federal Transit Administration (FTA) official signs this Grant Agreement, FTA has obligated and awarded federal assistance as provided below. Upon execution of this Grant Agreement by the Recipient named below, the Recipient affirms this FTA Award, enters into this Grant Agreement with FTA, and binds its compliance with the terms of this Grant Agreement.

The following documents are incorporated by reference and made part of this Grant Agreement:
(1) "Federal Transit Administration Master Agreement," FTA MA(34), http://www.transit.dot.gov,
(2) The Certifications and Assurances applicable to the FTA Award that the Recipient has selected and provided to FTA, and
(3) Any Award notification containing special conditions or requirements, if issued.

WHEN THE TERM "FTA AWARD" OR "AWARD" IS USED, EITHER IN THIS GRANT AGREEMENT OR THE APPLICABLE MASTER AGREEMENT, "AWARD" ALSO INCLUDES ALL TERMS AND CONDITIONS SET FORTH IN THIS GRANT AGREEMENT.

FTA OR THE FEDERAL GOVERNMENT MAY WITHDRAW ITS OBLIGATION TO PROVIDE FEDERAL ASSISTANCE IF THE RECIPIENT DOES NOT EXECUTE THIS GRANT AGREEMENT WITHIN 90 DAYS FOLLOWING FTA's AWARD DATE SET FORTH HEREIN.

FTA AWARD

Federal Transit Administration (FTA) hereby awards a Federal Grant as follows:

Recipient Information

Recipient Name: CITY OF SANTA FE

Recipient ID: 2066

UEI: QLN2YKMMJ8X6

DUNS: 069420818

Award Information

Federal Award Identification Number (FAIN): NM-2026-006

Award with Amendment Number: NM-2026-006-00

Award Name: City of Santa Fe - FY2023 Section 5307 Operating Assistance

Award Start Date: 1/30/2026

Original Award End Date: 12/31/2027

Current Award End Date: 12/31/2027

Award Executive Summary: The grant represents the FY2023 Small Urbanized Section 5307 Operating Assistance apportionment sub-allocated to the City of Santa Fe by the New Mexico Department of Transportation to provide fixed route service, and salaries and fringe benefits for the City of Santa Fe's Transit operations supervisors, drivers, mechanics, dispatch and operations support. There is a 50 percent Local match requirement of funds. which will be provided by the City of Santa Fe through the 1/4 cent gross receipts tax dedicated to Transit.

Project 1:
FY2023 (BIL) Section 5307 Operating Assistance
The grant represents the FY 2023 Small Urbanized Section 5307 sub-allocation of $2,167,799 to the City of Santa Fe. This grant is for operating assistance only. These funds will be used to support the continued transit services operated by the City of Santa Fe. Local match funds in the amount of $2,167,799 will be provided by the City of Santa Fe through the 1/4 cent gross receipts tax dedicated to Transit in the amount of $2,167,799. (Note: the Santa Fe UZA was apportioned $2,859,203 through the Santa Fe MPO, $2,167,799 was allocated to the City of Santa Fe and $691,404 was allocated to the North Central Regional Transit District.)

Research and Development: This award does not include research and development activities.

Indirect Costs: This award does not include an indirect cost rate.

Suballocation Funds: Recipient organization is suballocated these apportioned funds and can apply for and receive these funds directly.

Pre-Award Authority: This award is using Pre-Award Authority.

Award Budget

Total Award Budget: $4,335,598.00

Amount of Federal Assistance Obligated for This FTA Action (in U.S. Dollars): $2,167,799.00

Amount of Non-Federal Funds Committed to This FTA Action (in U.S. Dollars): $2,167,799.00

Total FTA Amount Awarded and Obligated (in U.S. Dollars): $2,167,799.00

Total Non-Federal Funds Committed to the Overall Award (in U.S. Dollars): $2,167,799.00

Award Budget Control Totals

(The Budget includes the individual Project Budgets (Scopes and Activity Line Items) or as attached)

Funding Source	Section of Statute	CFDA Number	Amount
5307 - Urbanized Area Formula Grants (2013 and forward)	5307-2A	20507	$2,167,799
Local			$2,167,799
Local/In-Kind			$0
State			$0
State/In-Kind			$0
Other Federal			$0
Transportation Development Credit			$0
Adjustment			$0
Total Eligible Cost			**$4,335,598**

(The Transportation Development Credits are not added to the amount of the Total Award Budget.)

U.S. Department of Labor Certification of Public Transportation Employee Protective Arrangements:

DOL Decision: DOL Concurs - Certified
DOL Review Date: 1/29/2026
DOL Certification Date: 1/29/2026

Special Conditions

There are no special conditions.

FINDINGS AND DETERMINATIONS

By signing this Award on behalf of FTA, I am making all the determinations and findings required by federal law and regulations before this Award may be made.

FTA AWARD OF THE GRANT AGREEMENT

Awarded By:
Gail Lyssy
Regional Administrator
FEDERAL TRANSIT ADMINISTRATION
U.S. DEPARTMENT OF TRANSPORTATION
Contact Info: gail.lyssy@dot.gov
Award Date: 1/30/2026

EXECUTION OF THE GRANT AGREEMENT

Upon full execution of this Grant Agreement by the Recipient, the Effective Date will be the date FTA or the Federal Government awarded Federal assistance for this Grant Agreement.

By executing this Grant Agreement, the Recipient intends to enter into a legally binding agreement in which the Recipient:
(1) Affirms this FTA Award,
(2) Adopts and ratifies all of the following information it has submitted to FTA:
    (a) Statements,
    (b) Representations,
    (c) Warranties,
    (d) Covenants, and
    (e) Materials,
(3) Consents to comply with the requirements of this FTA Award, and
(4) Agrees to all terms and conditions set forth in this Grant Agreement.

IN WITNESS WHEREOF, the City has executed this Grant Agreement as of the date of the signature by the required approval authorities below.

CITY OF SANTA FE:

_____
MICHAEL J. GARCIA, MAYOR

DATED: _____

ATTEST:

_____
CITY CLERK

Approved to form and legal sufficiency by:

Kevin L. Nault
Kevin L. Nault (Mar 18, 2026 15:22:05 MDT)
ASSISTANT CITY ATTORNEY

APPROVED FOR FINANCES:

ANDREA PHILLIPS (May 21, 2026 17:45:09 MDT)
FINANCE DIRECTOR

City of Santa Fe New Mexico

Finance Department

Project Ledger Request Form

Date of Request: 03/03/2026

Project Title: Section 5307 FY23/FY24 Operating Assistance

Project Type: ☑ CIP ☐ Grant ☑ Internal Tracking

Project ID: TAD2654007

Grant ID: F2613

Approved By: ERIKA LUJAN (Mar 9, 2026 15:53:32 MDT)

Entered By: CMT (Finance Use Only)

Department: PW-Transit Project Manager: Gabrielle Chavez Ext: 2055

Project Date Range: 7/1/2025 to 6/30/2026 ☐ Create Fixed Asset

---

☐ Multi-Funding (complete all funding sources, should equal 100%)

Funding Source: USDOT/FTA Section 5307 NM 2026-006 % of Funding: 50

MUNIS ORG: 5400491 MUNIS OBJ: 490550 Awarded Amount: $2,167,799.00

Funding Source: LOCAL MATCH % of Funding: 50%

MUNIS ORG: 5400491 MUNIS OBJ: _____ Awarded Amount: 2,167,799.00

Expense String Phase:

A project must have at least one phase identified, this can be used as an additional level of tracking, for example, CIP - Design, Construction, etc. For Grants can be used as reimbursable types, such as transportation, salaries.

(You can create more than one phase and you can default MUNIS ORGs and OBJs, optional)

Phase: SALARIES MUNIS ORG: 5400491 MUNIS OBJ: 500110

Phase: _____ MUNIS ORG: _____ MUNIS OBJ: _____

Phase: _____ MUNIS ORG: _____ MUNIS OBJ: _____

Contract number: N/A Comments/Other: PROJECT TOTAL: 4,336,598.00

GRANTS ONLY:

Grantor Name: USDOT-Federal Transit Administration NM-2026-006 Awarded Amount: $2,167,799.00

AR Charge Code: 5400491.490550 ☐ Grant funds multiple projects (Complete a form for each project)

Grantor Id: 700029 Federal CFDA (if applicable): 20.507

(If grants please provide all grant award documents with form) ☑ Attached Grant Documentation

Log # *{Finance use only}*:	
Journal # *{Finance use only}*:	

City of Santa Fe, New Mexico
BUDGET ADJUSTMENT REQUEST (BAR)

DEPARTMENT / DIVISION NAME	DATE
Public Works Department/ Transit	4/28/2025

ITEM DESCRIPTION	ORG	OBJECT	PROJECT	INCREASE	DECREASE
EXPENDITURES				*{enter as positive #}*	*{enter as negative #}*
REVENUES				*{enter as negative #}*	*{enter as positive #}*
US Dept of Transportation - 5307 Operating	5400491	490550	PLID TAD2654007	(2,167,799)	
				$ (2,167,799)	$ -

JUSTIFICATION: *(use additional page if needed)*
--Attach supporting documentation/memo

FTA Section 5307 Operating assistance for Formula grants awarded in FY23 for Transit Operating Assistance to cover expenses incurred beginning 01/30/2026 until 12/31/2027 for transit agency operations supervisors, drivers, mechanics, dispatch and operations support salaries and fringe benefits.

{Complete section below if BAR results in a net change to ANY Fund}

Fund(s) Affected	Fund Balance Increase/(Decrease)
TOTAL:	**0**

Gabrielle Chavez — 4/28/2026
Prepared By *{print name}* — Date

YVONNE SWENSON (May 6, 2026 14:20:46 MDT)
Business Operations Manager — Date

JOHN BURNETT (May 7, 2026 07:28:19 MDT)
Department Director Signature — Date

{Use this form for Finance Committee/ City Council agenda items ONLY}

CITY COUNCIL APPROVAL

City Council Approval Date:

Agenda Item #:

Andy Hopkins
Budget Officer — Date

Finance Director *{≤ $5,000}* — Date

N/A
City Manager *{≤ $60,000}* — Date

DATE: May 5, 2026

TO: Governing Body

VIA: Sam Burnett, Interim Public Works Department Director JOHN BURNETT (May 7, 2026 07:29:22 MDT)

FROM: Gabrielle Chavez, Transit Director of Administration Gabrielle Chavez (May 6, 2026 08:18:15 MDT)

REVIEWED BY: Carol Swenson, PW Business Operations Manager YVONNE SWENSON (May 6, 2026 08:09:26 MDT)

SUBJECT: FY26 BAR Correction/Reduction

ACTION:

Request for Approval of a Budget Adjustment Request (BAR) to Reduce Grant Revenue from the New Mexico Local Match Grant from the New Mexico Department of Finance and Administration in the Amount of $2,558,970.00 for FY26. (Gabrielle Chavez, Transit Director of Administration; gnchavez@santafenm.gov)

BACKGROUND/SUMMARY:

This City was awarded a New Mexico Local Match grant award for FY25 and FY26 to match the FY25/FY26 FTA Operating Assistance grant in the total amount of $4,018,120. The total amount expended in FY25 was $2,559,070, leaving a balance of $1,459,050 in local match operating assistance for FY26. The BAR previously approved to accept the grant was incorrect and included the total amount awarded for FY26 requiring a BAR adjustment to correct the revenue for FY26 to accurately reflect the appropriate funding expended and received in the Amount of $1,459,050 for FY26.

Attached is a Budget Adjustment Request to reduce the revenue funds from the Transit Division's Revenue budget (ORG: 5400491/490210 – NM Dept of Fin and Admin). The total adjustment Amount is $2,558,970. PLID PWD2554060.

City Council

Alma G. Castro, District 1 | Elizabeth "Liz" Barrett, District 2 | Lee Garcia, Mayor Pro Tem, District 3 | Jamie Cassutt, District 4
Patricia Feghali, District 1 | Paul C. Bustamante, District 2 | Pilar F.H. Faulkner, District 3 | Amanda Chavez, District 4

Attachments:

Budget Adjustment Request (BAR)

Log # *{Finance use only}*:	
Journal # *{Finance use only}*:	

City of Santa Fe, New Mexico
BUDGET ADJUSTMENT REQUEST (BAR)

DEPARTMENT / DIVISION NAME	DATE
Public Works Department/Transit	5/5/2026

ITEM DESCRIPTION	ORG	OBJECT	PROJECT	INCREASE	DECREASE
EXPENDITURES				*{enter as positive #}*	*{enter as negative #}*
REVENUES				*{enter as negative #}*	*{enter as positive #}*
New Mexico Department of Finance & Administration	5400491	490210	PWD2554060		2,558,970
				$ -	$ 2,558,970

JUSTIFICATION: *(use additional page if needed)*
--Attach supporting documentation/memo

BAR CORRECTION/REDUCTION: Correct revenue amount received by City of Santa Fe Transit Division

for the NM Local Match grant from the NM Department of Finance and Administration.

{Complete section below if BAR results in a net change to ANY Fund}

Fund(s) Affected	Fund Balance Increase/(Decrease)
TOTAL:	**0**

April Sanchez — 5/5/2026
Prepared By *{print name}* — Date

YVONNE SWENSON (May 6, 2026 08:09:26 MDT) — May 6, 2026
Business Operations Manger Signature — Date

JOHN BURNETT (May 7, 2026 07:29:22 MDT) — May 7, 2026
Department Director Signature — Date

{Use this form for Finance Committee/ City Council agenda items ONLY}

CITY COUNCIL APPROVAL

City Council Approval Date

Agenda Item #:

Andy Hopkins — May 7, 2026
Budget Officer — Date

Finance Director *{≤ $5,000}* — Date

City Manager *{≤ $60,000}* — Date

CITY OF SANTA FE

Date: April 28, 2026

To: Governing Body, Finance Committee, and Public Works & Utilities Committee

From: Taylor Jurgens, Engineer, Water Division TRJ

Via: Jesse Roach, Interim Public Utilities Department Director JR Jesse Roach

Jonathan Montoya, Acting Water Division Director JM JM

Subject: NM OSE Grant Agreement for McClure Dam Rehabilitation Planning and Design

Vendor Name: State of New Mexico Office of the State Engineer

---

ITEM AND ISSUE:

The Public Utilities Department respectfully requests your review and approval of a Grant Agreement with the State of New Mexico Office of the State Engineer in the total amount of $1,354,479.00 for planning and design for the rehabilitation of McClure Dam with a performance period ending September 24, 2027.

BACKGROUND AND SUMMARY:

The City of Santa Fe Water Division was awarded grant funding from the State of New Mexico Office of the State Engineer (OSE) for planning and design for the rehabilitation of McClure Dam. The grant includes a total allocated amount of $1,354,479.00. The OSE was awarded funds from FEMA through the High Hazard Potential Dams (HHPD) grant program as well as funds from the New Mexico Department of Finance and Administration (DFA) to cover the local match amount required by the FEMA HHPD grant. Therefore, the City does not have a local match requirement for this grant.

The grant funding will be used to cover a portion of the expenses related to the planning and design of the McClure Dam Rehabilitation project. Planning and design work has begun on the project and is expected to continue through 2026 and into 2027. The grant agreement has a performance period that ends September 24, 2027, which is the date that the grant funds must be expended by.

PRIOR APPROVALS AND SUPPORTING INFORMATION:

FUNDING SOURCE:

Fund Name/Number: Water Management/505

Munis Org Name/Number: Water-Capital Projects/5050395

Munis Object Name/Number: WIP Design/572960

Budget Officer / Designee: Andy Hopkins **Date:** _____

Budget Officer Comment/Exceptions: _____

Is this a Grant funded purchase? ☒ **Yes** | ☐ **No**

If yes, what is the issuing agency: New Mexico Office of the State Engineer

Approval: _____ **Title:** _____ **Date:** _____

Comment/Exceptions: _____

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

Project Ledger Number: WTR2550508

Approval: ERIKA LUJAN **Title:** Grants Manager **Date:** _____

ERIKA LUJAN (May 1, 2026 09:46:19 MDT)

Comment/Exceptions: _____

ATTACHMENTS:

NM OSE Grant Agreement DSB-FY26-HHPD-01

STATE OF NEW MEXICO
OFFICE OF THE STATE ENGINEER
SUB-RECIPIENT GRANT AGREEMENT DSB-FY26-HHPD-01

THIS AGREEMENT is made and entered into by and between the State of New Mexico, Office of the State Engineer (OSE), with mailing address: 5550 San Antonio Drive NE, Albuquerque, NM 87109, ("**Department**" or "Recipient") and the City of Santa Fe with mailing address: 200 Lincoln Ave., P.O. Box 909, Santa Fe, NM 87504-0909 ("Grantee" or "Subrecipient") (individually "**Party**" and collectively "**Parties**"). This Agreement shall be effective as of the date the Department executes it ("**Effective Date**").

WITNESSETH

WHEREAS, the rehabilitation of High Hazard Potential Dams (HHPD) grant program is authorized by 33 USC § 467f-2; and is administered through the Department of Homeland Security (DHS) Federal Emergency Management Agency (FEMA); and

WHEREAS, the Federal Emergency Management Agency (FEMA) has awarded the OSE a certain amount of funds through the HHPD grant program (Award No. EMT-2024-GR-05014);

WHEREAS, the New Mexico Department of Finance and Administration (DFA) has awarded the OSE the New Mexico Match Fund Grant to cover the Local Match Amount required by the FEMA HHPD Grant (Award No. MG26-91655);

WHEREAS, the purpose of this agreement is to specify and delineate the responsibilities and duties of the parties hereto, for rehabilitation of McClure Dam, hereinafter referred to as the "Project";

WHEREAS, the Department is charged with regulating the safety of dams in New Mexico including McClure Dam; and

WHEREAS, the Grantee owns, operates, and maintains McClure Dam for the purpose of municipal water supply for the City of Santa Fe and has requested funding assistance for the project;

NOW, THEREFORE, in consideration of the mutual covenants and obligations contained herein, the parties hereby mutually agree as follows:

AGREEMENT

I. PROJECT DESCRIPTION, GRANT AMOUNT, AND REVERSION

A. The Project that is the subject of this Agreement with current FEMA Performance Period 09/25/2024 to 09/24/2027 (subject to amendment) is described as follows: Tasks necessary to plan and design the rehabilitation of McClure Dam, Santa Fe County, New Mexico, as described in the Scope of Work for this Project dated 11/20/2024, and as may be amended by appropriately approved and executed Scope of Work Amendment.

B. Grantee's total reimbursements shall not exceed Eight Hundred Eighty Thousand Four Hundred Eleven Dollars and Thirty Five Cents ($880,411.35) ("FEMA Allocation Amount")

plus the 35-percent local match Four Hundred Seventy Four Thousand Sixty Seven Dollars and Sixty Five Cents ($474,067.65) ("Local Match Amount"), which equals One Million Three Hundred Fifty Four Thousand Four Hundred Seventy Nine Dollars ($1,354,479.00) ("Total Allocated Amount").

C. In the event of a conflict among the Total Allocated Amount, the Performance Period, as defined herein and/or the purpose of the Project, as set forth in this Agreement, and the corresponding language in the laws cited above in this Article I, the language of the FEMA award and the DFA Award cited herein shall control.

This project is referred to throughout the remainder of this Agreement as the "Project"; the information contained in Article I is referred to collectively throughout the remainder of this Agreement as the "Project Description." Attachment A sets forth additional or more stringent requirements and conditions, which are incorporated by this reference as if set forth fully herein. Attachment B sets forth additional requirements and conditions in accordance with the HHPD grant program reference in the Recitals above, which are incorporated by this reference as if set forth fully herein. If Attachment A and/or B imposes more stringent requirements than any requirement set forth in this Agreement, the more stringent requirements of Attachment A and/or B shall prevail, in the event of irreconcilable conflict. The Grantee shall reference the Project's number in all correspondence with and submissions to the OSE concerning the Project, including, but not limited to, Requests for Payment and reports.

The information contained in Article I is referred to collectively as the "**Project Description**."

II. DISBURSEMENT LIMITATION

A. Upon the Effective Date, the Grantee shall submit to the Department a comprehensive procurement plan and expenditure plan, detailing a Project timeline with milestones, required procurements, and identifying expected expenditures per milestone (collectively, "**Project Budget**"). The Department shall review and approve the Project Budget by issuing a Notice of Department's Obligation ("**Notice of Obligation**"), in accordance with the Project Description, a sample of which is attached hereto as **Exhibit A** and incorporated herein by reference. After receipt of a Notice of Obligation, the Grantee may be reimbursed for allowable costs up to the Total Allocated Amount. This Agreement and any reimbursements up to the Total Allocated Amount are expressly conditioned upon the following:

a. Irrespective of any Notice of Obligation, Grantee's expenditures shall be made in accordance with the Project Budget, on or before the end of the Performance Period and/or, if applicable, any Early Termination Date; and
b. The total amount received by Grantee shall not exceed the lesser of:
    i. the Total Allocated Amount identified in Article I (B) herein; or
    ii. the total of all amounts stated in the Notice(s) of Obligation evidencing the Department has received and accepted Grantee's Third-Party Obligation(s); and
c. Grantee's expenditures are made and accounted for pursuant to the State Procurement Code, State's Model Accounting Practices, and execution of binding written obligations or purchase orders with third-party contractors or vendors for the provision of services, including professional services, or the purchase of

tangible personal property and real property for the Project ("**Third Party Obligations**"); and

d. Grantee's submittal of timely Requests for Payment and supporting documentation in accordance with the procedures set forth in this Agreement; and
e. In the event capital assets acquired with Project funds are to be sold, leased, or licensed to or operated by a private entity, the sale, lease, license, or operating agreement:
    i. must be approved by the applicable oversight entity (if any) in accordance with NMSA 1978, § § 3-54-1 and 3-54-2; or
    ii. If no oversight entity is required to approve the transaction, the Department of Finance and Administration's Infrastructure Planning Development Division (IPDD) must approve it as complying with the law.

B. Prior to the sale, lease, license, or operating agreement being approved pursuant to Articles II(A)(e) (i) or (ii) herein, the Department may, in its sole and absolute discretion, unless inconsistent with State Board of Finance imposed conditions, reimburse Grantee for necessary expenditures incurred to develop the Project sufficiently to make the sale, lease, license, or operating agreement commercially feasible, limited to planning and design expenditures; and

C. Grantee's submission of documentation of all Third Party Obligations and amendments thereto (including terminations) to the Department and the Department's issuance of a Notice of Obligation for a particular amount in accordance with the terms of this Agreement shall be governed by the following:

a. Grantee is authorized to budget the particular amount set forth in the Notice of Obligation, execute the Third Party Obligation, and request the Third Party to begin work after issuance of a Notice of Obligation by the Department.
b. Grantee acknowledges and agrees that any Third Party Obligations agreed to prior to receiving a Notice of Obligation are its sole responsibility.
c. Grantee shall submit to the Department one copy of all Third Party Obligations and amendments thereto (including terminations) as soon as possible after execution by the Third Party but prior to execution by the Grantee.
d. Department may, in its sole and absolute discretion, issue a Notice of Obligation for the particular amount of a Third Party Obligation that only obligates the Department to reimburse Grantee's expenditures made on or before the Reversion Date or an Early Termination Date. The current Notice of Obligation form is incorporated herein and attached hereto as **Exhibit A**.

D. Grantee shall provide all necessary qualified personnel, materials, and facilities to implement the Project. The Grantee shall finance its share (if any) of the costs of the Project, including all Project overruns.

E. Prior to entering into this Agreement, the Department conducted a risk assessment on the Grantee and a project readiness review for the Project. In accordance with State Model Accounting Practices, FIN 9.2, if the Department determines that the expenditure of Project funds by the Grantee requires special conditions, those conditions are identified and listed in Attachment A, which is attached and incorporated by reference. The Parties agree that, to the extent the Department, in its sole and absolute discretion, determines

additional special conditions are necessary or that existing special conditions are no longer required, it may update Attachment A from time to time without the need for a formal amendment of this Agreement.

F. Project funds shall not be used for purposes other than those authorized by the Department in accordance with the Project Description.

G. Project funds cannot be used to reimburse the Grantee for indirect Project costs unless specifically allowed by law.

III. NOTICES

The following provisions shall apply whenever written notices, including written decisions, are to be given or received related to this Agreement.

The Grantee designates the person(s) listed below, or their successor, as their official representative(s) concerning all matters related to this Agreement:

Dam Owner: City of Santa Fe
Name: Michael Garcia
Title: Mayor
Address: PO Box 909
Santa Fe, NM 87504
Email: mayor@santafenm.gov
Telephone: 505-955-6590

Fiscal Agent: City of Santa Fe
Name: Erika Lujan
Title: Grants Manager
Address: 200 Lincoln Ave
Santa Fe, NM 87501
Email: evlujan@santafenm.gov
Telephone: 505-479-1334

The Department designates the person listed below, or their successors, as the Points of Contact for matters related to this Agreement.

Department: Office of the State Engineer
Name: Sushil Chaudhary
Title: Dam Safety Bureau Chief
Address: 5550 San Antonio Drive, NE
Albuquerque, NM 87109
Email: sushil.chaudhary@ose.nm.gov
Telephone: 505-383-4134

The Parties agree that all notices, including written decisions, related to this Agreement shall be sent to the persons named above by email or regular mail. For mailings, notices shall be deemed to have been given and received upon the date of the receiving party's actual receipt or five (5) calendar days after mailing, whichever shall first occur. In the

case of email transmissions, the notice shall be deemed to have been given and received on the date reflected on the delivery receipt of the email.

IV. TERM & DEADLINE TO EXPEND FUNDS

A. The term of this Agreement shall begin on the Effective Date and terminate on the day the FEMA Performance Period ends (09/24/2027 subject to amendment) unless Terminated Before FEMA Performance Period ends ("**Early Termination**") pursuant to Article V herein (collectively "**Term**").

B. The Project's funds must be expended on or before the end date of the FEMA Performance Period and, if applicable, the Early Termination Date of this Agreement.

   a. For purposes of this Agreement, it is not sufficient for the Grantee to encumber the Project funds on its books on or before the Reversion Date or Early Termination Date.
   b. For purposes of this Agreement, an expenditure of funds has occurred on the date the particular quantity of goods is delivered to and received by the Grantee, title to the goods is transferred to the Grantee, and/or as of the date particular services are rendered to and accepted by the Grantee.
   c. For purposes of this Agreement, an encumbrance of funds pursuant to a contract or purchase order with a third party does not qualify as an expenditure.

V. EARLY TERMINATION

A. General Provision. The Department may terminate this Agreement before the end of the FEMA Performance Period based on the Completion of the Project, Complete Expenditure of the Total Allocated Amoun and/or Violation of this Agreement. Early Termination hereunder includes:

   a. Termination due to completion of the Project before the end date of the FEMA Performance Period;
   b. Termination due to complete expenditure of the Total Allocated Amount before the end date of the FEMA Performance Period;
   c. Termination for violation of the terms of this Agreement; or
   d. Termination for suspected mishandling of public funds, including but not limited to fraud, waste, abuse, and conflicts of interest.

B. Non-appropriation. This Agreement is expressly contingent upon the United States Congress and the legislature of New Mexico, if applicable, making sufficient appropriations and authorizations for the Project Description.

   a. If the United States Congress or New Mexico Legislature does not appropriate the Total Allocated Amount, this Agreement shall terminate upon the Department giving the Grantee written notice of such termination. Such termination shall be effective as of the effective date of the law making the non-appropriation.
      i. The Department's decision as to whether sufficient appropriations or authorizations are available shall be final. Grantee hereby waives any

rights to assert an impairment of contract claim against the State of New Mexico in the event of Early Termination of this Agreement.

b. As used herein, “non-appropriate” or “non-appropriation” includes the following actions by the United States Congress or New Mexico Legislature:
    i. Deauthorization, reauthorization, or revocation of a prior authorization as communicated to the OSE by FEMA or DFA.

C. Grant Disbursements in the Event of Early Termination. In the event of Early Termination, the Department’s sole and absolute obligation to reimburse the Grantee is expressly conditioned upon the limitations set forth in Article II above.

D. Notice. Either Party may terminate this Agreement prior to the end date of the FEMA Performance Period by providing the other Party with a minimum of fifteen (15) days advance written notice of the Early Termination. Grantee hereby waives any rights to assert an impairment of contract claim against the State of New Mexico in the event of Early Termination of this Agreement by the Department.

VI. SUSPENSION OF NEW OR FURTHER OBLIGATIONS

A. Department, in its sole and absolute discretion, may provide written notice to Grantee to suspend entering into further obligations. Upon receipt of such written notice by the Grantee:

a. Grantee shall immediately suspend entering into new or further written obligations with third parties;
b. Department will suspend the issuance of any new or further Notice of Obligation under this Agreement; and
c. Department may direct the Grantee to implement a corrective action plan in accordance with Article VI (D) herein.

B. In the event of Suspension of this Agreement, the Department’s sole and absolute obligation to reimburse the Grantee is expressly conditioned upon the limitations set forth in Article II herein.

C. A suspension of new or further obligations under this Agreement shall remain in effect unless or until the date the Grantee receives written notice given by the Department informing the Grantee that the Suspension has been lifted or that the Agreement has been Early Terminated in accordance with Article V herein. If the Suspension is lifted, the Department will consider further requests for a Notice of Obligation.

D. Corrective Action Plan in the Event of Suspension. Where the Department, in its sole and absolute discretion, directs Grantee to suspend entering into new or further written obligations with third parties pursuant to Article VI(A), the Department may, but is not obligated to, require the Grantee to develop and implement a written corrective action plan to remedy the grounds for the Suspension.

a. Such a corrective action plan must be approved by the Department and be signed by the Grantee.
b. Failure to sign a corrective action plan or meet the terms and deadlines set forth in the signed corrective action plan is hereby deemed a violation of the terms of this Agreement for purposes of Early Termination, Article V(A)(c).
c. A corrective action plan shall be in addition to, and not in lieu of, any other equitable or legal remedy authorized hereunder or at law, including but not limited to Early Termination.

VII. AMENDMENTS

Unless expressly stated otherwise herein, this Agreement shall not be altered, changed, or amended except by an instrument in writing duly executed by both parties hereto with the same formalities as this agreement.

VIII. REPORTING

A. Database Reporting

a. Grantee shall provide the Department with monthly reports of Project activities, expenditures, and budget updates.
b. Additionally, Grantee shall certify on each Request for Payment form, attached hereto as **Exhibit B** and incorporated herein, that all information provided in the monthly reports is true and accurate and all Project activity complies with applicable law and the terms of this Agreement.
c. Grantee hereby acknowledges that failure to perform and/or certify updates to the monthly reports will jeopardize the reimbursement of funds. The Department shall give Grantee a minimum of fourteen (14) days' advance written notice of any changes to the information the Grantee is required to report.
d. At the Department's discretion, all reports required hereunder may be directed to and facilitated through an electronic database.
e. Monthly reports shall be due by 10th of the month after the month ends following the execution of this Agreement by the Department and ending during the month of the submission of the final request for reimbursement for the Project, or the following month. Monthly reports shall be in the form required by the Department.

B. Requests for Additional Information/Project Inspection

a. During the term of this Agreement and the Record Retention Period, the Department may:
    i. Request additional information regarding the Project as it deems necessary and
    ii. Conduct on-site inspections of the Project at reasonable times and upon reasonable notice.
b. Grantee shall respond to such requests for additional information within the time established by the Department.

IX. REQUEST FOR PAYMENT PROCEDURES

A. Grantee shall request payment by submitting the form attached hereto as **Exhibit B**. Payment requests are subject to the following procedures:

   a. Each Request for Payment must be in accordance with the Project Budget and contain proof of payment by the Grantee or liabilities incurred by the Grantee.
      i. Proof of payment must demonstrate the validity of an expenditure or liabilities incurred by Grantee.
      ii. However, Grantee may be reimbursed for unpaid liabilities only if the Department, in its sole and absolute discretion, agrees to do so and in accordance with any special conditions imposed by the Department.
   b. Obligated but unpaid invoices received by Grantee from third-party contractors or vendors may be reimbursed if the invoices comply with the provisions of this Agreement.
      i. The Grantee shall make payment to those contractors or vendors within five (5) business days from the date of receiving reimbursement from the Department or in a shorter period than the Department may prescribe in writing.
      ii. The Department reserves the right to make such payments directly to the contractors or vendors as a special condition under this Agreement.
      iii. The Grantee is required to certify to the Department proof of payment to the third-party contractor or vendor within five (5) business days from the date the Department reimburses the Grantee.

B. .

C. Deadlines. Grantee shall submit requests for Payments to the Department on the earlier of:

   a. Immediately as Grantee receives them, but at a maximum of thirty (30) days from when Grantee incurred the expenditure or liability; or
   b. Twenty (20) days from the date of Early Termination or the end date of FEMA Performance Period for expenditures or liabilities incurred before the Early Termination date or the end date of FEMA Performance Period .

D. Grantee's failure to abide by the requirements set forth in Article II and Article IX herein may result in the denial of its Request for Payment. Department reserves the right to reject a payment request for the Project unless and until it is satisfied that the expenditures or liabilities are for permissible purposes within the meaning of the Project Description, identified within the Project Budget, and that the Grantee is otherwise in compliance with this Agreement.

   a. Department's authority to reject any Request for Payment is in addition to, and not in lieu of, any other legal or equitable remedy available to the Department under this Agreement, at law, or in equity.

X. PROJECT CONDITIONS AND RESTRICTIONS

A. The following general conditions and restrictions shall apply to the Project:
   a. The Project's funds must be spent in accordance with all applicable state laws, regulations, policies, and guidelines, including, but not limited to, the State Procurement Code.
   b. The Project's expenditures and liabilities must be accounted for in accordance with the State's Model Accounting Practices, as amended from time to time.
   c. The Project must be implemented in accordance with the New Mexico Public Works Minimum Wage Act, Section 13-4-10 through 13-4-17 NMSA 1978, as applicable. Every contract or project in excess of sixty thousand dollars ($60,000) that the Grantee is a party to for construction, alteration, demolition or repair or any combination of these, including painting and decorating, of public buildings, public works or public roads and that requires or involves the employment of mechanics, laborers or both shall contain a provision stating the minimum wages and fringe benefits to be paid to various classes of laborers and mechanics, shall be based upon the wages and benefits that will be determined by the New Mexico Department of Workforce Solutions to be prevailing for the corresponding classes of laborers and mechanics employed on contract work of a similar nature in the locality. Further, every contract or project shall contain a stipulation that the contractor, subcontractor, employer or a person acting as a contractor shall pay all mechanics and laborers employed on the site of the project, unconditionally and not less often than once a week and without subsequent unlawful deduction or rebate on any account, the full amounts accrued at time of payment computed at wage rates and fringe benefit rates not less than those determined pursuant to Section 13-4-11 (B) NMSA 1978 to be the prevailing wage rates and prevailing fringe benefit rates issued for the project. In addition, the Project is subject to the federal Davis-Bacon Act, as amended.

   d. The Project must provide a public benefit above and beyond any incidental benefit to private entities in accordance with applicable law, including, but not limited to, Article IX, Section 14 of the Constitution of the State of New Mexico.
   e. Without prior written approval from the Department and State Board of Finance, for the useful life of any asset purchased under this Agreement, Grantee shall not convert any property acquired, built, renovated, repaired, designed, or developed with Project funds to uses other than those specified in the Project Description.
      i. In addition to other remedies available at law or in equity, any disposal or conversion of property acquired, built, renovated, repaired, designed, or developed with Project funds without the Department's and the Board of Finance's express written approval will trigger the Département's right to reimbursement from Grantee of the Appropriated Amount, transfer proceeds from any disposition of property to the State, or otherwise provide consideration to the State for the Appropriated Amounts.
   f. Grantee shall comply with all applicable federal and state laws, rules, and regulations pertaining to civil rights and equal employment opportunity.
      i. In accordance with all such laws, rules, and regulations, the Grantee agrees to assure that no person shall, on the grounds of race, color, national origin, sex, sexual preference, age, or handicap, be excluded from participation in the Project, use of the Project, employment with Grantee,

or otherwise be denied benefits/subject to discrimination for any activity performed under this Agreement.

g. Where the Department, in its sole and absolute discretion, determines Grantee has failed to comply with the above conditions and restrictions, Grantee agrees to take appropriate steps to correct any deficiencies immediately. The Grantee's failure to implement such appropriate steps within a reasonable time, but no longer than thirty (30) days after notice from the Department, constitutes a breach of this Agreement and grounds for Early Termination.

XI. REPRESENTATIONS AND WARRANTIES

A. Reliance by Department.

a. Grantee expressly acknowledges that the Department relies on the representations and warranties made by Grantee in this Agreement. Grantee acknowledges that such representations and warranties are a material inducement for the Department to enter into this Agreement and provide the Allocated Amount.

b. Grantee shall ensure all representations and warranties provided herein are true, accurate, and complete as of the date of the Effective Date and shall remain so throughout the Term of this Agreement. Grantee is responsible for promptly notifying the Department in writing of any changes or inaccuracies in the representations and warranties contained herein.

B. Grantee hereby represents and warrants the following:

a. Grantee has taken all necessary steps to attain the legal authority to receive and expend the Project's funds.

b. Grantee has duly authorized this Agreement, and the person executing it has authority to do so. Once executed by Grantee, this Agreement shall constitute a binding obligation of Grantee, enforceable according to its terms.

c. Grantee's obligations hereunder do not conflict with any law, ordinance, or resolution applicable to Grantee, Grantee's charter (if applicable), or any judgment or decree to which Grantee is subject.

d. Grantee has independently confirmed that the Project Description, including, but not limited to, the Total Allocated Amount and the end date of the FEMA Performance Period, is consistent with the underlying appropriation in law.

e. Grantee's governing body has duly adopted or passed as an official act a resolution, motion, or similar action authorizing the person identified as the official representative of the Grantee to sign and submit Requests for Payment on behalf of Grantee.

f. Grantee will abide by New Mexico laws regarding conflicts of interest, governmental conduct, and whistleblower protection.

i. Grantee agrees explicitly none of its officers or employees or its designees or agents, no member of the governing body, and no other public official of Grantee who exercises any function or responsibility with respect to this Agreement, shall have any interest, direct or indirect, in any contract or subcontract, or the proceeds thereof, for the Project.

ii. Further, Grantee will require all of its contractors to incorporate the language set forth in this paragraph prohibiting conflicts of interest in all subcontracts.

g. No funds have been paid or will be paid, by or on behalf of the Grantee, to any person for influencing or attempting to influence an officer or employee of the State, any agency, or body in connection with the awarding of any Third Party Obligation.
    i. Grantee will require certifying language prohibiting lobbying to be included in the award documents for all subawards, including subcontracts, loans, and cooperative agreements.

C. Consequences of False or Misleading Representations. If any representation or warranty made by Grantee is found to be false or misleading, the Department shall have the right to exercise any or all of the following remedies:

a. **Termination of Agreement:** Department may terminate this Agreement immediately upon written notice to the Grantee.
b. **Repayment of Grant Funds:** Grantee shall repay all Allocated Amounts disbursed under this Agreement, upon demand by the Department.
c. **Other Remedies:** Department may pursue any other remedies available at law or in equity.

D. Survival of Representations and Warranties. The representations and warranties made by the Grantee shall survive the Early Termination or expiration of this Agreement.

XII. PROJECT RECORDS

A. Grantee shall be strictly accountable for receipts and disbursements relating to the Project's funds. The Grantee shall follow generally accepted accounting principles and the State's Model Accounting Practices and, if feasible, maintain a separate bank account or fund with a separate organizational code to ensure separate budgeting and accounting of the funds.

B. For six (6) years following the Project's completion ("**Record Retention Period**"), Grantee shall maintain all Project-related records, including, but not limited to, all financial records, requests for proposals, invitations to bid, selection and award criteria, contracts and subcontracts, advertisements, minutes of pertinent meetings, as well as records sufficient to fully account for the amount and disposition of the Appropriated Amount from all sources budgeted for the Project, the purpose for which such funds were used, and such other records as the Department may prescribe.

C. Grantee shall make all Project records available to the Department, the Department's Independent Public Accountant, and the New Mexico State Auditor upon request. With respect to the funds that are the subject of this Agreement, if the State Auditor or the Department finds any funds were improperly expended, Grantee shall be required to reimburse the State all amounts found to be improperly expended.

XIII. IMPROPERLY REIMBURSED FUNDS

If the Department determines part or all of the Total Allocated Amount was improperly reimbursed to Grantee, including but not limited to funds reimbursed to Grantee based upon fraud,

mismanagement, misrepresentation, misuse, violation of law by the Grantee, after ten (10) days' notice to Grantee and the opportunity to return such funds to the Department, the Department may offset any funds due to Grantee from the State, until the Total Allocated Amount is fully repaid.

XIV. LIABILITY

Neither Party shall be responsible for liability incurred as a result of the other Party's acts or omissions in connection with this Agreement. Any liability incurred in connection with this Agreement is subject to immunities and limitations of the New Mexico Tort Claims Act.

XV. SCOPE OF AGREEMENT

This Agreement constitutes the entire and exclusive agreement between the Parties concerning the subject matter hereof. The Agreement supersedes all prior or contemporaneous agreements, understandings, discussions, communications, and representations, written or verbal.

XVI. REQUIRED NON-APPROPRIATIONS CLAUSE

A. Grantee acknowledges and agrees to include a "non-appropriations" clause in all contracts between it and other parties that are (i) funded in whole or part by funds made available under this Agreement and (ii) entered into after the effective date of this Agreement that states:

    a. "The terms of this Agreement are contingent upon sufficient appropriations and authorization being made by the US Congress to FEMA and New Mexico Legislature to DFA, as communicated to the OSE by FEMA and DFA, for the performance of this Agreement.
    b. If the OSE provides notification of insufficient appropriations and authorization, the City of Santa Fe may immediately terminate this Agreement by giving Contractor written notice of such termination.
    c. The City of Santa Fe's decision as to whether sufficient appropriations are available shall be final and accepted by the Contractor. Contractor hereby waives any rights to assert an impairment of contract claim against the City of Santa Fe or the State of New Mexico or FEMA in the event of immediate or Early Termination of this Agreement by the City of Santa Fe or the OSE."

XVII. REQUIRED TERMINATION CLAUSE

A. Grantee acknowledges and agrees to include the following termination clause in all contracts that are (i) funded in whole or part by funds made available under this Agreement and (ii) entered into after the effective date of this Agreement:

    a. "This contract is funded in whole or in part by funds made available by the State of New Mexico ("**State**"). Should terminate its Agreement with the City of Santa Fe, the City of Santa Fe may terminate this contract immediately by providing Contractor written notice of such termination.

b. In the event of termination pursuant to this paragraph, the City of Santa Fe's only liability to Contractor shall be for goods and services delivered and accepted prior to the termination date."

XVIII. COMPLIANCE WITH UNIFORM FUNDING CRITERIA

A. Throughout the term of this Agreement, Grantee shall:

a. Submit all reports of annual audits and agreed-upon procedures required by § 12-6-3(A)-(B), NMSA 1978 by the due dates established in § 2.2.2 NMAC, reports of which must be a public record pursuant to § 12-6-5(A), NMSA 1978 within forty-five (45) days of delivery to the State Auditor;
b. Have a duly adopted budget for the current fiscal year approved by its budgetary oversight agency (if any);
c. Timely submit all required financial reports to its budgetary oversight agency (if any); and
d. Use accounting methods and procedures consistent with Generally Accepted Accounting Principles and the State's Model Accounting Practices to expend the Appropriated Amount in accordance with applicable law and account for and safeguard Project funds and assets acquired with Project funds.

B. In the event Grantee fails to comply with the requirements of subparagraph A of this Article XVIII, Department may take one or more of the following actions:

a. Suspend new or further obligations pursuant to Article VI(A) of this Agreement;
b. Require the Grantee to develop and implement a written corrective action plan pursuant to Article VI(D) of this Agreement to remedy the non-compliance;
c. Impose special conditions to address the non-compliance by giving Grantee notice of such special conditions in accordance with Article III of this Agreement;
    i. The Parties agree that any special conditions imposed to address non-compliance shall be incorporated into this Agreement, through **Attachment A**, upon notice to, without need for formal amendment of this Agreement;
    ii. Special conditions shall be binding and effective on the date that notice is deemed to have been given pursuant to Article III or
d. Terminate this Agreement pursuant to Article V(A) of this Agreement.

XIX. GENERAL PROVISIONS

A. Assignment: The City of Santa Fe's rights and obligations under this Agreement are personal and may not be transferred or assigned without the prior written consent of the State. Any attempt at assignment or transfer without such consent shall be void. Any assignment or transfer of Grantee's rights and obligations approved by the State shall be subject to the provisions of this Agreement.

B. Subcontractors: Grantee shall not enter any subgrant or subcontract in connection with its obligations under this Agreement without the prior written approval of the State. Upon request, Grantee shall submit to the Department a copy of each such subgrant or subcontract.

C. Binding Effect: Except as otherwise provided, all provisions of this Agreement, including the benefits and burdens, shall extend to and be binding upon the Parties' respective successors and assigns.

D. Authority: Each Party represents and warrants to the other that the execution and delivery of this Agreement and the performance of such Party's obligations have been duly authorized.

E. Captions and References: The captions and headings in this Agreement are for the convenience of reference only and shall not be used to interpret, define, or limit its provisions. All references in this Agreement to sections (whether spelled out or using the § symbol), subsections, exhibits, or other attachments are references to sections, subsections, exhibits, or other attachments contained herein or incorporated as a part hereof, unless otherwise noted.

F. Counterparts: This Agreement may be executed in multiple, identical, original counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute the same agreement.

G. Digital Signatures: If any signatory signs this agreement using a digital signature in accordance with the State Policies regarding the use of digital signatures, then any agreement or consent to use digital signatures within the electronic system through which that signatory signed shall be incorporated into this Agreement by reference.

H. Modification: Except as otherwise provided in this Agreement, any modification to this Agreement shall only be effective if agreed to in a formal amendment, properly executed and approved in accordance with applicable New Mexico law and State fiscal policies and rules. Modifications permitted under this Agreement, other than Agreement amendments, shall conform to the policies issued by the State.

I. Statutes, Regulations, Fiscal Rules, and Other Authority: Any reference in this Agreement to a statute, regulation, policy, or other authority shall be interpreted to refer to such authority then current, as may have been changed or amended after the Effective Date of this Agreement.

J. External Terms and Conditions: Notwithstanding anything to the contrary herein, the State shall not be subject to any provision included in any terms, conditions, or agreements appearing on Grantee's or a subcontractor's website or any provision incorporated into any click-through or online agreements related to the Work unless that provision is specifically referenced in this Agreement.

K. Severability: The invalidity or unenforceability of any provision of this Agreement shall not affect the validity or enforceability of any other provision of this Agreement, which shall remain in full force and effect, provided that the Parties can continue to perform their obligations under this Agreement in accordance with its intent.

L. Survival of Certain Agreement Terms: Any provision of this Agreement that imposes an obligation on a Party after the termination or expiration of this Agreement shall survive the termination or expiration of this Agreement and shall be enforceable by the other Party.

M. Third Party Beneficiaries: Except for the Parties' respective successors and assigns described in this Agreement, it does not and is not intended to confer any rights or remedies upon any person or entity other than the Parties. Enforcement of this Agreement and all rights and obligations hereunder are reserved solely to the Parties. Any services or benefits that third parties receive as a result of this Agreement are incidental to this Agreement and do not create any rights for such third parties.

N. Waiver: A Party's failure or delay in exercising any right, power, or privilege under this Agreement, whether explicit or by lack of enforcement, shall not operate as a waiver, nor shall any single or partial exercise of any right, power, or privilege preclude any other or further exercise of such right, power, or privilege.

O. Standard and Manner of Performance: Grantee shall perform its obligations under this Agreement in accordance with the highest standards of care, skill, and diligence in Grantee's industry, trade, or profession.

P. Licenses, Permits, and Other Authorizations: Grantee shall secure, prior to the Effective Date, and maintain at all times during the term of this Agreement, at its sole expense, all licenses, certifications, permits, and other authorizations required to perform its obligations under this Agreement and shall ensure that all employees, agents, and subcontractors secure and maintain at all times during the term of their employment, agency or subcontractor, all license, certifications, permits and other authorizations required to perform their obligations in relation to this Agreement.

Q. Publicity: Any Publicity regarding the subject matter of this Agreement may not be released without prior written approval from the Department. For purposes of this agreement, "**Publicity**" means notices, informational pamphlets, press releases, email responses, research, reports, signs, and similar public notices prepared by or for the Grantee or jointly with others.

   a. Grantee shall obtain written approval prior to issuing any press release or making any public announcement regarding this agreement. Grantee agrees to obtain approval of the Department in advance with respect to all Public Relations, all communications with media, or all communications with any other member of the public with respect to this agreement, except to acknowledge that an agreement does exist.
   b. For purposes of this agreement, "Public Relations" includes community relations and means those activities dedicated to maintaining the Department's image or maintaining or promoting understanding and favorable relations with the community or public at large or any segment of the public.
   c. Violations of either Article XX (Q)(a) or (b) shall constitute a material Breach of Agreement.

R. Data Sharing: The State intends to secure and collate specific data generated by Grantee under this Agreement to use in support of the State's organizational, policy-making, and management of public resource functions. State, in accordance with **Exhibit D**, attached hereto and incorporated herein by reference, reserves the right to require Grantee and/or

its subcontractors to provide specific data relevant to the above-listed functions. Data provided by Grantee may be incorporated into existing or future developed State integrated analysis tools or databases, including but not limited to geographic information system (GIS) networks and databases accessible by the public. Dissemination of data collected may include historical data and projections based on such historical data.

a. To the extent any data transferred as part of this Agreement is legally determined to be the property of Subrecipient or its subcontractors, Subrecipient and/or its subcontractors grants State a nonexclusive, fully paid-up right and license to reproduce, use, distribute, do derivative works based on, and archive data transferred as part of this Agreement.

S. Venue and Choice of Law: This Agreement shall be governed by and construed in accordance with the laws of the State of New Mexico, without regard to any conflict of law provisions. Any legal suit, action, or proceeding arising out of or related to this Agreement shall be instituted exclusively in the district courts located in Santa Fe, New Mexico. The Parties hereby irrevocably submit to the exclusive jurisdiction and venue of such courts in any such suit, action, or proceeding. The Parties waive any objection to the laying of the venue of any such suit, action, or proceeding in the district courts of Santa Fe, New Mexico, and irrevocably waive and agree not to plead or claim in any such court that any such suit, action, or proceeding brought in any such court has been brought in an inconvenient forum.

[SIGNATURE PAGE AND EXHIBITS FOLLOW]
[THIS SPACE LEFT BLANK INTENTIONALLY]

IN WITNESS WHEREOF, the parties have duly executed this Agreement as of the Department's date of execution.

APPROVED BY DEPARTMENT: OFFICE OF THE STATE ENGINEER

By: _____

Name: Elizabeth K. Anderson, P.E.

Title: State Engineer Date:_____

Chief Financial Officer: By: _____

Name: Jim Williamson

Title: Chief Financial Officer Date:_____

AS TO BUDGET SUFFICIENCY

Program Support Director: By: _____

Name: Jeff Primm

Title: Program Support Director Date:_____

AS TO LEGAL FORM AND SUFFICIENCY

General Counsel's Office: By: _____

Name: R. Alfred Walker

Title: ALU Managing Attorney Date: 01/20/2026

APPROVED BY GRANTEE:

City of Santa Fe

By: _____

Name: _____ Date: _____

Title: _____ Date: _____

Attestation:

By: _____

Name: _____

Title: _____ Date:_____

Finance Director:

By: ANDREA PHILLIPS (May 1, 2026 16:38:13 MDT)

Name: _____

Title: _____ Date: 05/01/2026

Legal Counsel:

By: Marcos Martinez
Marcos Martinez (Apr 28, 2026 11:15:41 MDT)

Name: Marcos Martinez

Title: City Attorney Date: Apr 28, 2026

EXHIBIT A

NOTICE OF OBLIGATION TO REIMBURSE GRANTEE
EXHIBIT A

Notice of Obligation to Reimburse Grantee [# 1]

DATE: _____

FROM: Department: _____
TO: Grantee: _____
Grantee Official Representative: _____

SUBJECT: Notice of Obligation to Reimburse Grantee
Grant Number: _____
Grant Termination Date: _____

As the designated representative of the Department for Grant Agreement number [_____] entered into between Grantee and the Department, I certify that the Grantee has submitted to the Department the following third party obligation executed, in writing, by the third party's authorized representative:

Vendor or Contractor: [_____]
Third Party Obligation Amount: [_____]
Vendor or Contractor: [_____]
Third Party Obligation Amount: [_____]

Vendor or Contractor: [_____]
Third Party Obligation Amount: [_____]

I certify that the State is issuing this Notice of Obligation to Reimburse Grantee for permissible purposes within the scope of the project description, subject to all the terms and conditions of the above referenced Grant Agreement.

Grant Amount (Minus AIPP if applicable): [_____]
The Amount of this Notice of Obligation: [_____]
The Total Amount of all Previously Issued Notices of Obligation: _____]
The Total Amount of all Notices of Obligation to Date: [_____]
Note: Contract amounts may exceed the total grant amount, but the invoices paid by the grant will not exceed the grant amount.

Department Rep. Approver: [_____]
Title: [_____]
Signature: [_____]
Date: [_____]

1 Administrative and/or Indirect Cost – generally, the legislation authorizing the issuance of bonds prohibits the use of its proceeds for indirect expenses (e.g. penalty fees or damages other than pay for work performed, attorney fees, and administrative fees). Such use of bond proceeds shall not be allowed unless specifically authorized by statute.

EXHIBIT B

STATE OF NEW MEXICO
CAPITAL GRANT PROJECT
Request for Payment
Exhibit B

I.	**Grantee Information**		**II.**	**Payment Computation**
	(Make sure information is complete & accurate)		A.	Payment Request No.
A.	Grantee:		B.	Grant Amount
B.	Address:		C.	AIPP Amount *(If Applicable)*:
	(Complete Mailing, including Suite, if applicable)		D.	Funds Requested to Date:
			E.	Amount Requested this Payment:
			F.	Reversion Amount *(If Applicable)*:
	City State Zip		G.	Grant Balance
C.	Phone No:		H.	☐ GF ☐ OB ☐ STB (*attach wire if first draw*)
D.	Grant No:		I.	☐ Final Request for Payment *(if Applicable)*
E.	Project Title:			
F.	Grant Expiration Date:			

III. **Fiscal Year :**

(The State of NM Fiscal Year is July 1, 20XX through June 30, 20XX of the following year)

IV. ☐ **Reporting Certification:** I hereby certify to the best of my knowledge and belief, that database reporting is up to date, to include the accuracy of expenditures and grant balance, project status, project phase, achievements and milestones; and in compliance with Article VIII of the Capital Outlay Grant Agreement.

V. ☐ **Compliance Certification:** Under penalty of law, I hereby certify to the best of my knowledge and belief, the above information is correct; expenditures are properly documented, and are valid expenditures or actual receipts; and that the grant activity is in full compliance with Article IX, Sec. 14 of the New Mexico Constitution known as the "anti donation" clause.

Grantee Fiscal Officer or **Fiscal Agent** *(if applicable)*	**Grantee Representative**
Printed Name:	Printed Name:
Date:	Date:

(State Agency Use Only)

Vendor Code: _____ **Fund No.:** _____ **Loc No.:** _____

I certify that the State Agency financial and vendor file information agree with the above submitted information.

Division Fiscal Officer	Date	Division Project Manager	Date

EXHIBIT D
Data Sharing Provisions

Left Intentionally Blank
[May be used if required by DFA]

ATTACHMENT A
TO
OFFICE OF THE STATE ENGINEER
SUB-RECIPIENT GRANT AGREEMENT

ARTICLE 1 REVIEW

Upon execution of the agreement, the Grantee shall follow the procedures listed below unless waived in writing by the New Mexico Office of the State Engineer (OSE). As used in this Exhibit "OSE" means the New Mexico Office of the State Engineer, Dam Safety Bureau or its designated agent. The OSE may withhold payment if any of these procedures are not followed by the Grantee.

A. If the grant funds are to be used for the rehabilitation, modification, alteration, repair, removal or construction of a dam, the Grantee must coordinate and hold a scoping meeting with the OSE Dam Safety Bureau prior to procuring engineering or construction services or prior to commencing any work not included in an approved Operation and Maintenance Manual. The purpose of the scoping meeting is to define the extent of the project, the responsibilities of the project participants, the criteria to be applied to review and approval, and other topics that may improve overall execution and value of the project.

B. The Grantee must submit a detailed project description (scope of work) to the OSE prior to committing to expenditures from these funds. The project description shall include a schedule of the work to be completed in Gantt chart or Critical Path Method (CPM) format.

C. If the grant funds are to be used for the rehabilitation, modification, alteration, repair, removal or construction of a dam, the Grantee must comply with all applicable requirements of NMAC Title 19 Chapter 25 Part 12 – Rules and Regulations Governing Dam Design, Construction, and Dam Safety.

D. The Grantee must submit copies to the OSE of all executed contracts entered into by the Grantee prior to this agreement that are related to the project as determined by the OSE for review and approval.

E. If these grant funds are to be used for engineering and/or other professional services in excess of $60,000 the Grantee shall issue and conduct a Request for Proposals (RFP) for engineering services and/or other professional services in compliance with the New Mexico Procurement Code [Sections 13-1-21 et seq. NMSA 1978]. If the engineering fees will exceed $60,000, excluding gross receipt taxes, the Grantee is required to solicit Qualification-based proposals using the RFP template provided by the OSE or one provided by the Grantee but reviewed and accepted by the OSE. The Grantee must submit documentation regarding the hiring process to be used and the RFP, if applicable, to the OSE for review and approval **prior to** selecting engineering and/or other professional services.

F. If these grant funds are to be used for engineering and/or other professional services, the Grantee must submit a draft form of any engineering agreement and/or other professional services contract, or a letter certifying that the Grantee's staff will be used for design, to the OSE for review and approval **prior to** executing the agreement/contract or using Grantee's staff. The required engineering agreement format is to be provided by the OSE or provided by the Grantee but reviewed and accepted by the OSE.

G. A Preliminary Engineering Report (PER) or study by a registered New Mexico Professional Engineer may be required by the OSE. If the OSE requires a PER or study, the Grantee and its consultant shall meet with the OSE as described in Article 1. A. of this Attachment before starting any work for a meeting to fully discuss the scope and extent of the PER. The consultant shall present its preliminary outline for the PER, including the alternatives to be considered. The Grantee must submit the final PER and/or study to the OSE for review and approval **before** preparation of plans and specifications. The purpose of the PER and/or study is to analyze and choose the most technically feasible and cost effective solution for the project. If directed by the OSE, the Grantee shall follow the approach used by the USDA's Rural Utilities Service (RUS) Bulletin 1780-2 in preparation of the PER or study. Grantee shall not start the preparation of plans and specifications until Grantee receives OSE approval of the PER, study, or waiver of the report requirement.

H. A Value Engineering (VE) study coordinated and executed by a registered New Mexico Professional Engineer may be required by the OSE for projects completed under this agreement. Projects with preliminary or scoping phase construction cost estimates of $3.0 Million or greater may be subject to this VE study requirement.

I. If the grant funds are to be used for engineering design or for construction, the Grantee must submit all plans, specifications, and any addenda (prepared by a registered New Mexico Professional Engineer) for this project to the OSE for review and approval **before** the project is advertised for construction bids.

J. The Grantee must submit all work related to easements, rights-of-ways, other property rights, and financing provisions associated with the project to the OSE for review **prior to** advertising for construction bids. The Grantee must certify in writing that this has been done **prior to** award of the construction contract. Proof of property ownership or easements for the land upon or through which the facility is being constructed with appropriate stamps or markings indicating they are filed with the County Assessor, may be required **prior to** the award of a construction contract. When real property or easements will be acquired by the Grantee, either through purchase or donation, as a part of this project and within the project period, the Grantee shall submit to the OSE documentation of the acquisition, including a legal description of the property, the date the property will be acquired, evidence of clear title, and an appraisal report prepared by a qualified appraiser who was selected through applicable procurement procedures. These documents must be reviewed and approved by the OSE **prior to** the acquisition of any real property. After real property acquisition, the Grantee shall make available to the OSE all documents of title pertaining to the acquired property and all easements or rights-of-way necessary for the completion of work under this grant agreement as described above.

K. The Grantee shall submit the recommendation of award, certified bid tabulation, a copy of bid bond for the selected contractor and evidence of full project financing to the OSE for review and approval **prior to** awarding the contract. Grantee shall not award the contract until the OSE has concurred with the award in writing. Competitive bidding, in accordance with applicable state laws (including local wage determinations as provided for in Section 13-4-11 NMSA 1978), shall be used for awarding construction contracts. Contracts shall be awarded to the responsive, responsible bidder who submits the lowest acceptable bid, or as provided for by State Law.

L. Following OSE approval of the proposed award, the Grantee shall submit to the OSE for review the notice of the award and the minutes of the meeting in which the award was made,

the notice of a pre-construction conference, a copy of the executed construction contract documents (including payment and performance bonds), and the notice to contractor to proceed. The selected contractor shall be required to post a performance and payment bond in accordance with requirements of Section 13-4-18 NMSA 1978.

M. The selected contractor shall be required to submit a critical path method (CPM) construction schedule to the Grantee at the pre-construction conference with a copy to the OSE.

N. The Grantee shall submit all modifications to plans and contract by change orders to the OSE promptly for review and approval **prior to** implementation of such modification or change. The decision by the OSE will be rendered promptly in writing to the Grantee. In cases necessitating immediate action, a verbal decision will be rendered by the OSE and followed by written confirmation to the Grantee.

O. The Grantee shall provide a Resident Project Representative (RPR) to observe construction of the project. The RPR may be a contractor that is secured through the process described in Article 1.E. of this Attachment. If a contractor is used, an agreement must be executed in accordance with the process described in Article 1.F. of this Attachment. The decision on the need for a full-time or part-time RPR is at the sole discretion of the OSE based on oversight requirements and may be modified during the project. The Grantee will be required to submit the RPR's résumé to the OSE for review and approval prior to commencement of construction.

P. Notwithstanding the inspections performed by the Grantee and its engineer, the OSE will have the right to examine all installations comprising the project, including materials delivered and stored on-site for use on the project. Such examinations shall not be considered an inspection for compliance with contract plans but will be in the nature of general OSE review as described in Article 2 below.

ARTICLE 2 OSE OVERSIGHT

OSE site visits, reviews, and approvals are only for purposes of compliance with applicable grant requirements, procedures, and regulations. Any OSE approval shall not be interpreted or construed as any warranty or guarantee. Approval of plans and design of the project means only that plans are complete and in compliance with applicable grant requirements, procedures, and regulations. The OSE will bring to the Grantee's attention any obvious defects in the project's design, materials, or workmanship, but all such defects and their correction shall be the responsibility of the Grantee and its contractors and consultants. Any questions raised by the OSE during its site visits and reviews shall be resolved exclusively by the Grantee. The Grantee and its contractors and consultants shall remain responsible for the completion and success of the project. Any OSE approval shall not relieve the owner or engineer of legal responsibilities for the overall integrity of the project, adequacy of the design, safety, or compliance with all applicable regulations.

ARTICLE 3 CLOSEOUT

A. The project will not be considered complete until the work as defined in this agreement has been fully performed, and finally and unconditionally accepted by the Grantee and the OSE.

B. If the grant funds are to be used for preparation of a PER, a study, or plans and specifications, reimbursement to the grantee will be made after approval by the OSE of the PER, study, or

plans and specifications. Reimbursements shall not constitute approval of any of these documents.

C. If the grant funds are to be used for purchase of equipment, final reimbursement will be made after approval by the OSE of receipt of equipment title and appraisal reports for used equipment.

D. If the grant funds are to be used for construction (Exhibit E), final reimbursement will be made after the final site visit has been conducted by the OSE and the following items, unless waived by the OSE, have been provided to the OSE in writing, and have been reviewed and approved by the OSE:

i. Operation and maintenance manuals for equipment or a letter from the owner certifying receipt and acceptance of the manuals for the installed equipment;

ii. A final reimbursement request including the final certified construction pay request prepared by the Grantee's project engineer and approved by the Grantee;

iii. A certificate of substantial completion issued by the project's engineer of record, including punch list items;

iv. A letter certifying project acceptance by the Grantee and the Grantee's project engineer stating that work has been satisfactorily completed and the construction contractor has fulfilled all of the obligations required under the contract documents with the Grantee, or if payment and materials performance bonds have been "called", an acceptance close-out settlement to the Grantee and contractor shall be submitted to the OSE for final review and approval;

v. Certification letter by the Grantee that the Labor Standards Contract Provisions have been met;

vi. Record drawings prepared by the Grantee's project engineer or a letter from the owner certifying receipt and acceptance of the record drawings;

vii. Complete and legally effective releases or waivers (satisfactory to the Grantee) of all liens arising out of the contract documents and the labor services performed and the materials and equipment furnished thereunder. In lieu thereof and as approved by the Grantee, contractor(s) may furnish receipts or releases in full; together with an affidavit of contractor that the releases and receipts include labor, services, materials, and equipment for which a lien could be filed and that all payrolls, material and equipment bills, and other indebtedness connected with the work for which the Grantee or its property might in any way be responsible, have been paid or otherwise satisfied;

viii. A written consent of the surety, if any, to final payment; and

ix. Grantee's ledger sheets, including all payments made by the Grantee, may be requested with the final reimbursement request and before the final reimbursement request can be processed by the OSE.

ENGINEERS CONSTRUCTION STATUS REPORT*

EXHIBIT E

Prepared for the Office of the State Engineer Dam Safety Bureau

** To be Submitted with Payment Application*

Project Name:	Project Number (DFA):
Interim Project Report ☐ Final ☐ Other ☐ _____ Report Period: From ____ / ____ / ____ To ____ / ____ / ____	
Field Orders Issued or Contemplated This Period: No.____ No.____ No.____	
Change Orders Issued or Contemplated This Period: No.____ Net Change in Contract Price $ _____ Justification: Original Contract Price: $_____ Current Contract Price: $ _____	
CONTRACT TIME: Original Completion Date or Days _____ Current Completion Date or Days _____ Days Remaining for Completion _____ Percent Project is Complete _____% On Schedule? Yes ☐ No ☐	
Briefly Describe Project Progress During This Period:	
Issues Addressed During This Period (Indicate Any Issues That Remain Unresolved):	
Engineer's Attestation:	Owner Concurrence:

ATTACHMENT B
TO THE OFFICE OF THE STATE ENGINEER
HHPD GRANT AGREEMENT

DEPARTMENT OF HOMELAND SECURITY
STANDARD TERMS AND CONDITIONS

FY 2024 DHS STANDARD TERMS AND CONDITIONS

[Recipient is the Office of the State Engineer and subrecipient is the grantee (the entity) to whom the federal grant is sub-awarded by the Office of the State Engineer.]

The Fiscal Year (FY) 2024 Department of Homeland Security (DHS) Standard Terms and Conditions apply to all new federal awards of federal financial assistance (federal awards) for which the federal award date occurs in FY 2024 and flow down to subrecipients unless a term or condition specifically indicates otherwise. For federal awards that may involve continuation awards made in subsequent FYs, these FY 2024 DHS Standard Terms and Conditions will apply to the continuation award unless otherwise specified in the terms and conditions of the continuation award. The United States has the right to seek judicial enforcement of these terms and conditions.

All legislation and digital resources are referenced with no digital links. These FY 2024 DHS Standard Terms and Conditions are maintained on the DHS website at https://www.dhs.gov/publication/fy15-dhs-standard-terms-and-conditions.

A. Assurances, Administrative Requirements, Cost Principles, Representations, and Certifications

I. Recipients must complete either the Office of Management and Budget (OMB) Standard Form 424B Assurances – Non- Construction Programs, or OMB Standard Form 424D Assurances – Construction Programs, as applicable. Certain assurances in these documents may not be applicable to your program and the DHS financial assistance office (DHS FAO) may require applicants to certify additional assurances. Applicants are required to fill out the assurances as instructed by the federal awarding agency.

B. General Acknowledgements and Assurances

Recipients are required to follow the applicable provisions of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards in effect as of the federal award date and located at 2 C.F.R. Part 200 and adopted by DHS at 2 C.F.R. §3002.10. All recipients and subrecipients must acknowledge and agree to provide DHS access to records, accounts, documents, information, facilities, and staff pursuant to 2 C.F.R. §200.337.

I. Recipients must cooperate with any DHS compliance reviews or compliance investigations.

II. Recipients must give DHS access to examine and copy records, accounts, and other documents and sources of information related to the federal financial assistance award and permit access to facilities and personnel.

III. Recipients must submit timely, complete, and accurate reports to the appropriate DHS officials and maintain appropriate backup documentation to support the reports.

IV. Recipients must comply with all other special reporting, data collection, and evaluation requirements required by law, federal regulation, Notice of Funding Opportunity, federal award specific terms and conditions, and/or federal awarding agency program guidance.

V. Recipients must complete the DHS Civil Rights Evaluation Tool within thirty (30) days of receiving the Notice of Award for the first award under which this term applies. Recipients of multiple federal awards from DHS should only submit one completed tool for their organization, not per federal award. After the initial submission, recipients are required to complete the tool once every two (2) years if they have an active federal award, not every time a federal award is made. Recipients must submit the completed tool, including

supporting materials, to CivilRightsEvaluation@hq.dhs.gov. This tool clarifies the civil rights obligations and related reporting requirements contained in these DHS Standard Terms and Conditions. Subrecipients are not required to complete and submit this tool to DHS. The evaluation tool can be found at https://www.dhs.gov/publication/dhs- civil-rights-evaluation-tool. The DHS Office for Civil Rights and Civil Liberties will consider, in its discretion, granting an extension to the 30-day deadline if the recipient identifies steps and a timeline for completing the tool. Recipients must request extensions by emailing the request to CivilRightsEvaluation@hq.dhs.gov prior to expiration of the 30-day deadline.

C. Standard Terms & Conditions

I. Acknowledgement of Federal Funding from DHS

Recipients must acknowledge their use of federal award funding when issuing statements, press releases, requests for proposal, bid invitations, and other documents describing projects or programs funded in whole or in part with federal award funds.

II. Activities Conducted Abroad

Recipients must coordinate with appropriate government authorities when performing project activities outside the United States obtain all appropriate licenses, permits, or approvals.

III. Age Discrimination Act of 1975

Recipients must comply with the requirements of the Age Discrimination Act of 1975, Pub. L. No. 94-135 (codified as amended at 42 U.S.C. § 6101 *et seq*.), which prohibits discrimination on the basis of age in any program or activity receiving federal financial assistance.

IV. Americans with Disabilities Act of 1990

Recipients must comply with the requirements of Titles I, II, and III of the Americans with Disabilities Act, Pub. L. No. 101-336 (1990) (codified as amended at 42 U.S.C. §§ 12101–12213), which prohibits recipients from discriminating on the basis of disability in the operation of public entities, public and private transportation systems, places of public accommodation, and certain testing entities.

V. Best Practices for Collection and Use of Personally Identifiable Information

Recipients who collect personally identifiable information (PII) as part of carrying out the scope of work under a federal award are required to have a publicly available privacy policy that describes standards on the usage and maintenance of the PII they collect. DHS defines PII as any information that permits the identity of an individual to be directly or indirectly inferred, including any information that is linked or linkable to that individual. Recipients may also find the DHS Privacy Impact Assessments: Privacy Guidance and Privacy Template as useful resources respectively.

VI. Civil Rights Act of 1964 – Title VI

Recipients must comply with the requirements of Title VI of the Civil Rights Act of 1964, Pub. L. No. 88-352 (codified as amended at 42 U.S.C. § 2000d *et seq*.), which provides that no person in the United States will, on the grounds of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance. DHS implementing regulations for the Act are found at 6 C.F.R. Part 21. Recipients of an award

from the Federal Emergency Management Agency (FEMA) must also comply with FEMA's implementing regulations at 44 C.F.R. Part 7.

VII. Civil Rights Act of 1968

Recipients must comply with Title VIII of the Civil Rights Act of 1968, Pub. L. No. 90-284 (codified as amended at 42 U.S.C. § 3601 *et seq*.) which prohibits recipients from discriminating in the sale, rental, financing, and advertising of dwellings, or in the provision of services in connection. therewith, on the basis of race, color, national origin, religion, disability, familial status, and sex, as implemented by the U.S. Department of Housing and Urban Development at 24 C.F.R. Part 100. The prohibition on disability discrimination includes the requirement that new multifamily housing with four or more dwelling units—i.e., the public and common use areas and individual apartment units (all units in buildings with elevators and ground-floor units in buildings without elevators)—be designed and constructed with certain accessible features. (See 24 C.F.R. Part 100, Subpart D.)

VIII. Copyright

Recipients must affix the applicable copyright notices of 17 U.S.C. §§ 401 or 402 to any work first produced under federal awards and also include an acknowledgement that the work was produced under a federal award (including the federal award number and federal awarding agency). As detailed in 2 C.F.R. § 200.315, a federal awarding agency reserves a royalty-free, nonexclusive, and irrevocable right to reproduce, publish, or otherwise use the work for federal purposes and to authorize others to do so.

IX. Debarment and Suspension

Recipients must comply with the non-procurement debarment and suspension regulations implementing Executive Orders (E.O.) 12549 and 12689 set forth at 2 C.F.R. Part 180 as implemented by DHS at 2 C.F.R. Part 3000. These regulations prohibit recipients from entering into covered transactions (such as subawards and contracts) with certain parties that are debarred, suspended, or otherwise excluded from or ineligible for participation in federal assistance programs or activities.

X. Drug-Free Workplace Regulations

Recipients must comply with drug-free workplace requirements in Subpart B (or Subpart C, if the recipient is an individual) of 2 C.F.R. Part 3001, which adopts the Government-wide implementation (2 C.F.R. Part 182) of the Drug-Free Workplace Act of 1988 (41 U.S.C. §§ 8101-8106).

XI. Duplicative Costs

Recipients are prohibited from charging any cost to this federal award that will be included as a cost or used to meet cost sharing or matching requirements of any other federal award in either the current or a prior budget period. (See 2 C.F.R. § 200.403(f)). However, recipients may shift costs that are allowable under two or more federal awards where otherwise permitted by federal statutes, regulations, or the federal financial assistance award terms and conditions.

XII. Education Amendments of 1972 (Equal Opportunity in Education Act) – Title IX

Recipients must comply with the requirements of Title IX of the Education Amendments of 1972, Pub. L. No. 92-318 (codified as amended at 20 U.S.C. § 1681 *et seq*.), which provide that no person in the United States will, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any educational

program or activity receiving federal financial assistance. DHS implementing regulations are codified at 6 C.F.R. Part 17. Recipients of an award from the Federal Emergency Management Agency (FEMA) must also comply with FEMA's implementing regulations at 44 C.F.R. Part 19.

XIII. E.O. 14074 – Advancing Effective, Accountable Policing and Criminal Justice Practices to Enhance Public Trust and Public Safety

Recipient State, Tribal, local, or territorial law enforcement agencies must comply with the requirements of section 12(c) of E.O. 14074. Recipient State, Tribal, local, or territorial law enforcement agencies are also encouraged to adopt and enforce policies consistent with E.O. 14074 to support safe and effective policing.

XIV. Energy Policy and Conservation Act

Recipients must comply with the requirements of the Energy Policy and Conservation Act, Pub. L. No. 94-163 (1975) (codified as amended at 42 U.S.C. § 6201 *et seq*.), which contain policies relating to energy efficiency that are defined in the state energy conservation plan issued in compliance with this Act.

XV. False Claims Act and Program Fraud Civil Remedies

Recipients must comply with the requirements of the False Claims Act, 31 U.S.C. §§ 3729-3733, which prohibit the submission of false or fraudulent claims for payment to the Federal Government. (See 31 U.S.C. §§ 3801-3812, which details the administrative remedies for false claims and statements made.)

XVI. Federal Debt Status

All recipients are required to be non-delinquent in their repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowances, and benefit overpayments. (See OMB Circular A-129.)

XVII. Federal Leadership on Reducing Text Messaging while Driving

Recipients are encouraged to adopt and enforce policies that ban text messaging while driving recipient-owned, recipient-rented, or privately owned vehicles when on official government business or when performing any work for or on behalf of the Federal Government. Recipients are also encouraged to conduct the initiatives of the type described in Section 3(a) of E.O. 13513.

XVIII. Fly America Act of 1974

Recipients must comply with Preference for U.S. Flag Air Carriers (a list of certified air carriers can be found at: Certificated Air Carriers List | US Department of Transportation, https://www.transportation.gov/policy/aviation-policy/certificated-air-carriers-list)for international air transportation of people and property to the extent that such service is available, in accordance with the International Air Transportation Fair Competitive Practices Act of 1974, 49 U.S.C. § 40118, and the interpretative guidelines issued by the Comptroller General of the United States in the March 31, 1981, amendment to Comptroller General Decision B-138942.

XIX. Hotel and Motel Fire Safety Act of 1990

Recipients must ensure that all conference, meeting, convention, or training space funded entirely or in part by federal award funds complies with the fire prevention and control guidelines of Section 6 of the Hotel and Motel Fire Safety Act of 1990, 15 U.S.C. § 2225a.

XX. John S. McCain National Defense Authorization Act of Fiscal Year 2019

Recipients, subrecipients, and their contractors and subcontractors are subject to the prohibitions described in section 889 of the John S. McCain National Defense Authorization Act for Fiscal Year 2019, Pub. L. No. 115-232 (2018) and 2 C.F.R. §§ 200.216, 200.327, 200.471, and Appendix II to 2 C.F.R. Part 200. The statute – as it applies to DHS recipients, subrecipients, and their contractors and subcontractors – prohibits obligating or expending federal award funds on certain telecommunications and video surveillance products and contracting with certain entities for national security reasons.

XXI. Limited English Proficiency (Civil Rights Act of 1964, Title VI)

Recipients must comply with Title VI of the Civil Rights Act of 1964 (42 U.S.C. § 2000d *et seq*.) prohibition against discrimination on the basis of national origin, which requires that recipients of federal financial assistance take reasonable steps to provide meaningful access to persons with limited English proficiency (LEP) to their programs and services. For additional assistance and information regarding language access obligations, please refer to the DHS Recipient Guidance: https://www.dhs.gov/guidance-published-help-department-supported-organizations-provide-meaningful-access-people-limited and additional resources on http://www.lep.gov.

XXII. Lobbying Prohibitions

Recipients must comply with 31 U.S.C. § 1352 and 6 C.F.R. Part 9, which provide that none of the funds provided under a federal award may be expended by the recipient to pay any person to influence, or attempt to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any federal action related to a federal award or contract, including any extension, continuation, renewal, amendment, or modification. Per 6 C.F.R. Part 9, recipients must file a lobbying certification form as described in Appendix A to 6 C.F.R. Part 9 or available on Grants.gov as the Grants.gov Lobbying Form and file a lobbying disclosure form as described in Appendix B to 6 C.F.R. Part 9 or available on Grants.gov as the Disclosure of Lobbying Activities (SF-LLL).

XXIII. National Environmental Policy Act

Recipients must comply with the requirements of the National Environmental Policy Act of 1969, Pub. L. No. 91-190 (1970) (codified as amended at 42 U.S.C. § 4321 *et seq*.) (NEPA) and the Council on Environmental Quality (CEQ) Regulations for Implementing the Procedural Provisions of NEPA, which require recipients to use all practicable means within their authority, and consistent with other essential considerations of national policy, to create and maintain conditions under which people and nature can exist in productive harmony and fulfill the social, economic, and other needs of present and future generations of Americans.

XXIV. Nondiscrimination in Matters Pertaining to Faith-Based Organizations

It is DHS policy to ensure the equal treatment of faith-based organizations in social service programs administered or supported by DHS or its component agencies, enabling those organizations to participate in providing important social services to beneficiaries. Recipients must comply with the equal treatment policies and requirements contained in 6 C.F.R. Part 19 and other applicable statues, regulations, and guidance governing the participations of faith- based organizations in individual DHS programs.

XXV. Non-Supplanting Requirement

Recipients of federal awards under programs that prohibit supplanting by law must ensure that federal funds supplement but do not supplant non-federal funds that, in the absence of such federal funds, would otherwise have been made available for the same purpose.

XXVI. Notice of Funding Opportunity Requirements

All the instructions, guidance, limitations, scope of work, and other conditions set forth in the Notice of Funding Opportunity (NOFO) for this federal award are incorporated by reference. All recipients must comply with any such requirements set forth in the NOFO. If a condition of the NOFO is inconsistent with these terms and conditions and any such terms of the Award, the condition in the NOFO shall be invalid to the extent of the inconsistency. The remainder of that condition and all other conditions set forth in the NOFO shall remain in effect.

XXVII. Patents and Intellectual Property Rights

Recipients are subject to the Bayh-Dole Act, 35 U.S.C. § 200 *et seq*. and applicable regulations governing inventions and patents, including the regulations issued by the Department of Commerce at 37 C.F.R. Part 401 (Rights to Inventions Made by Nonprofit Organizations and Small Business Firms under Government Awards, Contracts, and Cooperative Agreements) and the standard patent rights clause set forth at 37 C.F.R. § 401.14.

XXVIII. Procurement of Recovered Materials

States, political subdivisions of states, and their contractors must comply with Section 6002 of the Solid Waste Disposal Act, Pub. L. No. 89-272 (1965) (codified as amended by the Resource Conservation and Recovery Act at 42 U.S.C. § 6962) and 2 C.F.R. §200.323. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition.

XXIX. Rehabilitation Act of 1973

Recipients must comply with the requirements of Section 504 of the Rehabilitation Act of 1973, Pub. L. No. 93-112 (codified as amended at 29 U.S.C. § 794), which provides that no otherwise qualified handicapped individuals in the United States will, solely by reason of the handicap, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance.

XXX. Reporting of Matters Related to Recipient Integrity and Performance

If the total value of any currently active grants, cooperative agreements, and procurement contracts from all federal awarding agencies exceeds $10,000,000 for any period of time during the period of performance of the federal award, then the recipient must comply with the requirements set forth in the government-wide Award Term and Condition for Recipient Integrity and Performance Matters located at 2 C.F.R. Part 200, Appendix XII, the full text of which is incorporated by reference.

XXXI. Reporting Subawards and Executive Compensation

For federal awards that equal or exceed $30,000, recipients are required to comply with the requirements set forth in the government-wide award term on Reporting Subawards and Executive Compensation set forth at 2 C.F.R. Part 170, Appendix A, the full text of which is incorporated by reference.

XXXII. Required Use of American Iron, Steel, Manufactured Products, and Construction Materials

Recipients of an award of Federal financial assistance from a program for infrastructure are hereby notified that none of the funds provided under this award may be used for a project for infrastructure unless:

(1) all iron and steel used in the project are produced in the United States—this means all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States;

(2) all manufactured products used in the project are produced in the United States—this means the manufactured product was manufactured in the United States; and the cost of the components of the manufactured product that are mined, produced, or manufactured in the United States is greater than 55 percent of the total cost of all components of the manufactured product, unless another standard for determining the minimum amount of domestic content of the manufactured product has been established under applicable law or regulation; and

(3) all construction materials are manufactured in the United States—this means that all manufacturing processes for the construction material occurred in the United States.

The Buy America preference only applies to articles, materials, and supplies that are consumed in, incorporated into, or affixed to an infrastructure project. As such, it does not apply to tools, equipment, and supplies, such as temporary scaffolding, brought to the construction site and removed at or before the completion of the infrastructure project. Nor does a Buy America preference apply to equipment and furnishings, such as movable chairs, desks, and portable computer equipment, that are used at or within the finished infrastructure project but are not an integral part of the structure or permanently affixed to the infrastructure project.

Waivers

When necessary, recipients may apply for, and the agency may grant, a waiver from these requirements. The agency should notify the recipient for information on the process for requesting a waiver from these requirements.

(a) When the Federal agency has determined that one of the following exceptions applies, the awarding official may waive the application of the domestic content procurement preference in any case in which the agency determines that:

(1) applying the domestic content procurement preference would be inconsistent with the public interest;

(2) the types of iron, steel, manufactured products, or construction materials are not produced in the United States in sufficient and reasonably available quantities or of a satisfactory quality; or

(3) the inclusion of iron, steel, manufactured products, or construction materials produced in the United States will increase the cost of the overall project by more than 25 percent.

A request to waive the application of the domestic content procurement preference must be in writing. The agency will provide instructions on the format, contents, and supporting

materials required for any waiver request. Waiver requests are subject to public comment periods of no less than 15 days and must be reviewed by the Made in America Office. There may be instances where an award qualifies, in whole or in part, for an existing waiver described at "Buy America" Preference in FEMA Financial Assistance Programs for Infrastructure | FEMA.gov. The definitions applicable to this term are set forth at 2 C.F.R. § 184.3, the full text of which is incorporated by reference.

XXXIII. SAFECOM

Recipients receiving federal financial assistance awards made under programs that provide emergency communication equipment and its related activities must comply with the SAFECOM Guidance for Emergency Communication Grants, including provisions on technical standards that ensure and enhance interoperable communications. The SAFECOM Guidance is updated annually and can be found at Funding and Sustainment | CISA.

XXXIV. Terrorist Financing

Recipients must comply with E.O. 13224 and applicable statutory prohibitions on transactions with, and the provisions of resources and support to, individuals and organizations associated with terrorism. Recipients are legally responsible for ensuring compliance with the E.O. and laws.

XXXV. Trafficking Victims Protection Act of 2000 (TVPA)

Recipients must comply with the requirements of the government-wide financial assistance award term which implements Trafficking Victims Protection Act of 2000, Pub. L. No. 106-386, § 106 (codified as amended at 22 U.S.C. § 7104). The award term is located at 2 C.F.R. § 175.15, the full text of which is incorporated by reference.

XXXVI. Universal Identifier and System of Award Management

Recipients are required to comply with the requirements set forth in the government-wide financial assistance award term regarding the System for Award Management and Universal Identifier Requirements located at 2 C.F.R. Part 25, Appendix A, the full text of which is incorporated reference.

XXXVII. USA PATRIOT Act of 2001

Recipients must comply with requirements of Section 817 of the Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism Act of 2001 (USA PATRIOT Act), which amends 18 U.S.C. §§ 175–175c.

XXXVIII. Use of DHS Seal, Logo and Flags

Recipients must obtain written permission from DHS prior to using the DHS seals, logos, crests, or reproductions of flags, or likenesses of DHS agency officials. This includes use of DHS component (e.g., FEMA, CISA, etc.) seals, logos, crests, or reproductions of flags, or likenesses of component officials.

XXXIX. Whistleblower Protection Act

Recipients must comply with the statutory requirements for whistleblower protections at 10 U.S.C § 470141 U.S.C. § 4712.

XL. Environmental Planning and Historic Preservation (EHP) Review

DHS/FEMA funded activities that may require an Environmental Planning and Historic Preservation (EHP) review are subject to the FEMA EHP review process. This review does not address all federal, state, and local requirements. Acceptance of federal funding requires the recipient to comply with all federal, state and local laws. DHS/FEMA is required to consider the potential impacts to natural and cultural resources of all projects funded by DHS/FEMA grant funds, through its EHP review process, as mandated by: the National Environmental Policy Act; National Historic Preservation Act of 1966, as amended; National Flood Insurance Program regulations; and any other applicable laws and executive orders. General guidance for FEMA's EHP process is available on the DHS/FEMA Website at: https://www.fema.gov/grants/guidance-tools/environmental-historic. Specific applicant guidance on how to submit information for EHP review depends on the individual grant program and applicants should contact their grant Program Officer to be put into contact with EHP staff responsible for assisting their specific grant program. The EHP review process must be completed before funds are released to carry out the proposed project; otherwise, DHS/FEMA may not be able to fund the project due to noncompliance with EHP laws, executive orders, regulations, and policies. If ground disturbing activities occur during construction, applicant will monitor ground disturbance, and if any potential archaeological resources are discovered the applicant will immediately cease work in that area and notify the pass-through entity, if applicable, and DHS/FEMA.

XLI. Applicability of DHS Standard Terms and Conditions to Tribes

The DHS Standard Terms and Conditions are a restatement of general requirements imposed upon recipients and flow down to sub-recipients as a matter of law, regulation, or executive order. If the requirement does not apply to Indian tribes or there is a federal law or regulation exempting its application to Indian tribes, then the acceptance by Tribes of, or acquiescence to, DHS Standard Terms and Conditions does not change or alter its inapplicability to an Indian tribe. The execution of grant documents is not intended to change, alter, amend, or impose additional liability or responsibility upon the Tribe where it does not already exist.

XLII. Acceptance of Post Award Changes

In the event FEMA determines that an error in the award package has been made, or if an administrative change must be made to the award package, recipients will be notified of the change in writing. Once the notification has been made, any subsequent requests for funds will indicate recipient acceptance of the changes to the award. Please call FEMA Grant Management Operations at (866)927-5646 or via e-mail to: ASK-GMD@fema.dhs.gov if you have any questions.

XLIII. Disposition of Equipment Acquired Under the Federal Award

For purposes of original or replacement equipment acquired under this award by a non-state recipient or non-state sub-recipients, when that equipment is no longer needed for the original project or program or for other activities currently or previously supported by a federal awarding agency, you must request instructions from FEMA to make proper disposition of the equipment pursuant to 2 C.F.R. section 200.313. State recipients and state sub-recipients must follow the disposition requirements in accordance with state laws and procedures.

XLIV. Prior Approval for Modification of Approved Budget

Before making any change to the FEMA approved budget for this award, you must request prior written approval from FEMA where required by 2 C.F.R. section 200.308. For purposes of non-construction projects, FEMA is utilizing its discretion to impose an additional restriction under 2 C.F.R. section 200.308(f) regarding the transfer of funds among direct cost categories, programs, functions, or activities. Therefore, for awards with an approved budget where the federal share is greater than the simplified acquisition threshold(currently $250,000), you may not transfer funds among direct cost categories, programs, functions, or activities without prior written approval from FEMA where the cumulative amount of such transfers exceeds or is expected to exceed ten percent(10%) of the total budget FEMA last approved. For purposes of awards that support both construction and non-construction work, FEMA is utilizing its discretion under 2C.F.R. section 200.308(h)(5) to require the recipient to obtain prior written approval from FEMA before making any fund or budget transfers between the two types of work. You must report any deviations from your FEMA approved budget in the first Federal Financial Report (SF-425) you submit following any budget deviation, regardless of whether the budget deviation requires prior written approval.

XLV. Indirect Cost Rate

2 C.F.R. section 200.211(b)(15) requires the terms of the award to include the indirect cost rate for the federal award. If applicable, the indirect cost rate for this award is stated in the budget documents or other materials approved by FEMA and included in the award file.

XLVI. Pass-Through to Subrecipients

Awards made to the State Authorized Agency (SAA) for HHPD carry additional pass-through requirements. Pass-through is defined as an obligation on the part of the SAA to make funds available to eligible subrecipients. All pass-through entities must comply with Section 2 C.F.R. 200.332 Requirements for pass-through entities.

XLVII. Mitigation Plan Extraordinary Circumstances:

A Hold Payment will apply for the award that has a hazard mitigation plan that does not include all dam risks. This is a corrective action to the original term of the award, which allowed up to 12 months after the date FEMA approved the subrecipients workplan to meet the local mitigation plan requirement as described in the Notice of Funding Opportunity (NOFO). If a recipient fails to comply with the terms and conditions of a federal award, FEMA may terminate the award in whole or in part. If the noncompliance can be corrected, FEMA may first attempt to direct the recipient to correct the noncompliance. In the event the noncompliance is not able to be corrected by imposing additional conditions or the recipient or subrecipient refuses to correct the matter, FEMA might take other remedies allowed under 2 C.F.R. § 200.339. These remedies include actions to disallow costs, recover funds, wholly or partly suspend, or terminate the award, initiate suspension, and debarment proceedings, withhold further federal awards, or take other remedies that may be legally available. For further information on termination due to noncompliance, see the section on Termination Provisions in the NOFO.

XLVIII. Revision of Budget and Scope of Work Package (formerly called “amendment/workplan”)

Within 90 days of the notice of award, the State Authorized Agency must submit a revision or Scope of Work package to FEMA for approval that describes the budget and project scope for all work proposed, including identification of all subrecipients, in accordance with 2 C.F.R. § 200.308. The grant award is based on the recipient’s Program Work Plan (Scope of Work

package) and applicant eligibility for an allocation under this program and does not convey approval of project scope of work for subrecipients. Budget amounts over each recipient's allocation cannot be funded, and budget amounts short of the allocation may require FEMA recovering the difference between the allocation and budget amount.

XLIX. Eligible High Hazard Potential Dam Documentation

The State Authorized Agency(SAA) must submit a list of all eligible high hazard potential dams in their state with the application. The SAA must submit official assurance statement (signed by the State Dam Safety Officer or Governor's Authorized Representative) that all dams included on the list of eligible high hazard potential dams are regulated by the state dam safety program and meet the HHPD criteria for eligible high hazard potential dams (Source:33 USC-467(4)(A)).

L. Performance Goal

The objective of the HHPD grant is to provide financial assistance for repair, removal, or rehabilitation of eligible high hazard potential dams. Based on the review of your application, FEMA will verify the claimed costs are consistent with the stated program objective. By accepting this award, you certify that the total Federal award amount comports to the total of all allowable costs incurred by the recipient during this fiscal year, in keeping with the program’s objective. FEMA will further assess the recipient’s performance against the program objectives during the quarterly reporting cycles and the award closeout process outlined in the Performance Measures section of the HHPD grant Notice of Funding Opportunity.

LI. Infrastructure Investment and Jobs Act Funded Projects

Recipients of awards using Infrastructure Investment and Jobs Act funding are required to report during quarterly reporting cycles the project award details and description, subaward project level location data, and the project status and progress toward achieving dam risk reduction project outcomes.

Signature: Taylor Jurgens

Email: trjurgens@santafenm.gov

Signature: JONATHAN MONTOYA
JONATHAN MONTOYA (Apr 29, 2026 05:23:15 MDT)

Email: jmmontoya@santafenm.gov

Signature:

Email: jdroach@santafenm.gov

Michael J. Garcia, Mayor

DATE: May 14, 2026

TO: Governing Body
Finance Committee
Public Works and Utilities Committee

FROM: Jesse Roach, Interim Public Utilities Department Director

SUBJECT: New Mexico Special Appropriation Grant Agreement

The New Mexico Office of the State Engineer has generously offered up to two million dollars ($2,000,000) in legislative appropriations to the City of Santa Fe to reimburse fiscal year 2026 costs associated with critical maintenance and improvements at Nichols Dam. The actual amount will be determined by qualifying expenses through June 30, 2026 that will not be reimbursed through any other funding mechanism. The City of Santa Fe's Public Utilities Department expects to be able to take advantage of nearly $1,300,000 of this generous offer and recommends approval of the attached NEW MEXICO SPECIAL APPROPRIATION GRANT AGREEMENT for Santa Fe Critical Dam Maintenance and Improvement Project ZJ5134.

City Council

Alma G. Castro, District 1
Patricia Feghali, District 1
Elizabeth "Liz" Barrett, District 2
Paul C. Bustamante, District 2
Lee Garcia, Mayor Pro Tem, District 3
Pilar F.H. Faulkner, District 3
Jamie Cassutt, District 4
Amanda Chavez, District 4

NEW MEXICO SPECIAL APPROPRIATION GRANT AGREEMENT
Santa Fe Critical Dam Maintenance and Improvement Project ZJ5134

This Special Appropriation Grant Agreement ("**Agreement**") is made and entered into by and between the State of New Mexico, Office of the State Engineer ("**Grantor**" or "**OSE**") and the City of Santa Fe ("**Grantee**") (individually "**Party**" and collectively "**Parties**"). This Agreement shall be effective as of the date the OSE executes it ("**Effective Date**").

WITNESSETH

WHEREAS, pursuant to Subsection 102 of Section 5 of Chapter 210 of Laws 2023 the Legislature appropriated ten million dollars ($10,000,000) to OSE for critical dam maintenance and improvement projects, Subsequently, Subsection 134 of Section 5 of Chapter 160 of Laws 2025 provided that the OSE was permitted to use up to six million dollars ($6,000,000) of that appropriation to the OSE for other identified purposes. In the event that some of the identified purposes may not be able to utilize their maximum allocations, the OSE desires to enter into an agreement with the Grantee to grant up to two million dollars ($2,000,000) of remaining funds available to the Grantee from the appropriation for additional critical dam maintenance and improvement projects in Santa Fe, with the final amount to be established at OSE's sole discretion, ("**Project**"); and

NOW, **THEREFORE**, the Parties mutually agree as follows:

ARTICLE I - SCOPE OF WORK

A. Grantee agrees that it will implement, in all respects, the activities outlined in its Program Description, attached hereto as **Exhibit** "**A**," and incorporated herein by reference.

B. Grantee agrees to make no change to the Program Description as defined herein without first submitting a written request to the OSE and obtaining the OSE's written approval of the proposed change.

ARTICLE II - LENGTH OF GRANT AGREEMENT

A. The term of this Agreement shall become effective July 1, 2025, and will terminate on June 30, 2026.

B. The General Appropriation Act of 2025, Section 5 states: "Unless otherwise indicated, the appropriation may be expended in fiscal years 2025 and 2026". Per section 5, any unexpended funds remaining at the end of fiscal year 2026 shall revert to the appropriate fund.

ARTICLE III - REPORTS

A. Evaluation:

   a. Grantee agrees to systematically collect, analyze, and use data to evaluate programs, initiatives, and policies by examining both the process and

outcomes to determine their effectiveness. Grantee agrees to review and update the existing evaluation plan regularly throughout the fiscal year.

b. Grantee agrees that data entered into a database or otherwise provided to the OSE, is complete, accurate, and allows the OSE's designated evaluation contractor to develop and implement an evaluation system and/or to provide relevant reports derived from the available data.

c. To adequately evaluate the progress of the Project statewide, Grantee shall provide, within thirty (30) days, upon request of the OSE's evaluator(s), information and access to program records and records of contractors working for Grantee.

B. Progress Reports:

a. To adequately evaluate the progress of this Agreement, Grantee shall provide periodic quarterly progress reports to the OSE ("Progress Reports"). The Progress Reports shall contain a narrative and/or bulleted highlights of successes and challenges, aa detailed budget breakdown of project milestones and expenditures to date, which includes expenditure back-up documentation, a certification all expenditures comply with the requirements of this Agreement, and anticipated project milestones and expenditures during the next quarter, in the form required by the OSE, attached hereto as **Exhibit** "**B**," and incorporated herein by reference ("**Quarterly Progress Report**"), and such other information following the objectives of Grantee's evaluation as may be of assistance to the OSE in its evaluation. The first quarterly Progress Report is due on the thirtieth (30th) day following the end of the quarter, directly after the Effective Date.

b. Grantee represents and warrants that Quarterly Progress Reports submitted to the OSE will not contain any "personally identifiable information" or "individually identifiable health information" in accordance with HIPAA.

C. Final Report:

a. Grantee shall submit one copy of the final report for the Project to the OSE. The Final Report shall include the information called for in Article III, Paragraphs B (1) and B (2) for the fourth quarter. This requirement shall survive the termination of this Agreement.

b. The Final Report and final reimbursement shall include sufficient detail to evaluate the effectiveness of each program component and shall be submitted no later than July 10th following expiration of the Term of this Agreement.

D. Annual Report:

a. Grantee shall submit one copy of the annual report for the Project to the OSE. The Annual Report shall include the relevant data from the Project, including highlights for the period, budget to actual expenditures to date, and other information requested by the OSE in the format provided by the OSE. This requirement shall survive the termination of this Agreement.

b. The Annual Report shall be submitted no later than the date determined by the OSE.

ARTICLE IV - CONSIDERATION AND METHOD OF PAYMENT

A. In consideration of Grantee's satisfactory completion of all work and services required to be performed under the terms of this Agreement, and in compliance with all other Agreement requirements herein stated, the OSE shall pay Grantee a sum not to exceed two million dollars ($2,000,000). The funds are to be expended in accordance with the proposed budget attached hereto as **Exhibits** "**C**," incorporated herein by reference. The Parties agree that the Grantee's expenditure of these monies shall not deviate from the line items or amounts of the budget without the prior written approval of the OSE.

B. It is understood and agreed that if any portion of the funds set forth in Article IV, Paragraph (A), are not expended at the completion of this Agreement for the purpose(s) designated in this Agreement, shall revert to the OSE for disposition.

C. All Grantee payment requests shall be subject to Grantor review and acceptance. Payments will be made on a reimbursement of actual cost basis for cost incurred by Grantee during the grant period unless the Grantor determines, with the express permission of the State Controller, that advance payment to Grantee is justified. Grantee must submit all payment requests to Grantor no later than July 15, 2026. Payment requests shall be sent to the Program Manager and include, at minimum, the following documentation:

   a. A completed Request for Payment Form, attached hereto as **Exhibit** "**D**."

   b. A copy of the paid invoice or receipt from vendor (or due and payable invoice from vendor in the case of advance payment).

   c. A copy of the canceled check for the payment made to vendor (in the case of advance payment Grantee shall send a copy of the cancelled check for the payment made to the vendor to Grantor within five days of the vendor's deposit of the check to document appropriate use of the funds advanced).

D. Payment shall be made only for those services specified in this Agreement and not funded by any other public entity funding source. **The Grantee shall not bill the OSE for the same service or services that have been billed to another funding agency or source.**

ARTICLE V - MODIFICATION AND TERMINATION

A. The OSE, upon written notice to Grantee, shall have the unilateral right to immediately terminate this Agreement if, in the judgment of the OSE, the provisions of this Agreement are violated or the activities described in the Program Description do not

progress satisfactorily. In this regard, the OSE may demand a refund of all or part of the funds dispersed to Grantee.

B. The Parties may modify any terms and conditions of this Agreement by mutual agreement confirmed in writing with the same formalities for execution as this Agreement.

C. Early Termination for Convenience: Except as provided in Article X and subparagraph A above, either Party may terminate this Agreement by providing the other Party with a minimum of thirty (30) days' advance written notice of the termination.

D. Liability in the Event of Early Termination: In the event of early termination of this Agreement by either party, the OSE's sole liability shall be to reimburse Grantee in accordance with this Grant Agreement for qualifying expenditures that were:

   a. Incurred pursuant to a legally binding agreement entered into by Grantee before Grantee's receipt of the OSE's notice of early termination or the issuance by the Grantee of a notice of early termination;

   b. Incurred on or before the termination date in the notice of early termination;

   c. For permissible purposes under this Agreement's Program Description and procured and executed in accordance with applicable law; and

   d. The subject of a Request for Payment Form properly and timely submitted in accordance with Article IV of this Agreement.

ARTICLE VI – REPRESENTATIONS AND WARRANTIES

Grantee hereby represents and warrants that it will comply with all State laws, regulations, policies, guidelines, and requirements with respect to the acceptance and use of State funds. Also, Grantee certifies that:

A. It has the legal authority to receive and expend the funds as described in the Program Description.

B. It shall meet all requirements of the General Appropriation Act of 2025, the Regulations, and all other New Mexico State laws and regulations as they pertain to all activity conducted under this Agreement and provide the OSE with verification thereof.

C. It shall finance all costs of the Project, including all Project overruns.

D. Every facility, program, or other provider with which it contracts to perform the activities that are subject to this Agreement shall, at all times, comply with all applicable State and federal laws and regulations and any licensure requirements governing treatment facilities, programs, or providers. All Contracts shall contain the following provisions:

a. “The Contractor agrees to comply, at all times, with all applicable State and federal laws and regulations and any licensure requirements governing its program and facility.”
b. The Grantee agrees it shall be solely liable for the failure of any of its providers to meet and comply with all applicable State and federal laws and licensure requirements governing the treatment provider or the program.

E. It shall comply with the State Procurement Code, Sections 13-1-28 through 13-1-199, NMSA 1978.

F. All professional services, activities, or programs will be implemented through a professional service contract. Grantee will submit all Project-related contracts and agreements to the OSE for review and approval prior to execution. Amendments to existing contracts will be submitted to the OSE for review and approval prior to execution.

a. Without limiting the foregoing, Grantee shall be required to complete a request-for-proposal (RFP) for contracts over sixty thousand dollars ($60,000); provided, however, that if Grantee’s governing body’s guidelines have more stringent requirements, the Grantee’s governing body’s guidelines must be followed.

b. Sole Source contracts can be utilized if written justification is provided, confirming that the organization is the only one in the area that can provide services uniquely and substantially related to the intended purpose of the contract. Grantee shall submit written documentation describing the reason(s) for sole source contracting to the OSE prior to entering into the contract. Grantee shall adhere to all applicable provisions and requirements outlined in the State Procurement Code.

G. It will adhere to all OSE financial and accounting requirements, including the State’s Model Accounting Practices, as amended from time to time.

H. It will comply with all applicable conditions and requirements prescribed by the OSE regarding the receipt of Project funds.

I. It shall not at any time utilize or convert any equipment or property acquired or developed pursuant to this Agreement for any use other than those specified in the scope of work as defined in the Agreement without the prior approval of the OSE.

J. No member, officer, employee, or family member(s) of the Grantee, or its designees or agents, no member of the governing body of the locality in which the program is situated, and no other public official of such locality or localities who exercises any functions or responsibilities with respect to the program during his/her tenure or for one year thereafter, shall have any interest, direct or indirect, in any contract, or the process thereof, for work to be performed in connection with the program assisted under the grant, and the Grantee shall incorporate, in all such contracts, a provision prohibiting such interest pursuant to the purposes of this certification.

a. No funds have been paid or will be paid, by or on behalf of the Grantee, to any person for influencing or attempting to influence an officer or employee of the State, any agency, or body in connection with the awarding of any Third Party Obligation.

    i. Grantee will require certifying language prohibiting lobbying to be included in the award documents for all subawards, including subcontracts, loans, and cooperative agreements.

K. It will comply with all applicable federal requirements and regulations.

The representations and warranties made by Grantee shall survive the Early Termination or expiration of this Agreement.

ARTICLE VII - RETENTION OF RECORDS

A. Accountability: Grantee shall be strictly accountable for receipts and disbursements relating to this Agreement. Grantee shall follow generally accepted accounting principles, the State's model accounting principles, § 6-6-2 NMSA 1978, and, if feasible, maintain a separate bank account or fund with a separate organizational code to ensure separate budgeting and accounting of the funds.

B. Record Retention: For six (6) years following the Program's completion ("**Record Retention Period**"), Grantee shall maintain all Project-related records, including, but not limited to, all financial records, requests for proposals, invitations to bid, selection and award criteria, contracts and subcontracts, advertisements, minutes of pertinent meetings, as well as records sufficient to fully account for the amount and disposition of funds from all sources budgeted for the Program, the purpose for which such funds were used, and such other records as the OSE may prescribe.

    a. All Program records must adhere to the New Mexico State Records Center and Archives Rule for Functional Retention and Disposition Schedule, 1.21.2 NMAC.

C. Grantee shall make all Project records available to the OSE, the OSE's Independent Public Accountant, and the New Mexico State Auditor upon request. With respect to the funds that are the subject of this Agreement, if the State Auditor or the OSE finds any funds were improperly expended, Grantee shall be required to reimburse the State all amounts found to be improperly expended plus interest in accordance with Article IX below.

ARTICLE VIII - REPRESENTATIVES

A. Grantee hereby designates the person listed below as the official Grantee Representative responsible for overall supervision of the approved Project:

    a. Name: Jesse Roach
    b. Title: Interim Public Utilities Department Director
    c. Address: 801 W. San Mateo, Santa Fe, NM, 87505
    d. Phone: (505) 955-4309

e. Email: jdroach@santafenm.gov

B. The OSE designates the person listed below as its Project Manager, responsible for the overall administration of this Agreement, including compliance and monitoring of Grantee:

a. Name: Sushil Chaudhary
b. Title: Senior Manager Executive Engineer
c. Address: 5550 San Antonio Drive, NE
d. Phone: (505) 383-4134
e. Email: sushil.chaudhary@ose.nm.gov

ARTICLE IX – IMPROPERLY REIMBURSED FUNDS

If the OSE determines part or all of the funds reimbursed under this Agreement were improperly requested by Grantee, including but not limited to reimbursements based upon fraud, mismanagement, misrepresentation, misuse, or violation of law by the Grantee, after ten (10) days' notice to Grantee and the opportunity to return such funds to the OSE, the OSE may offset any funds due to Grantee from the State, until the improperly reimbursed funds are fully repaid.

ARTICLE X – SCOPE OF AGREEMENT

This Agreement constitutes the entire and exclusive agreement between the Parties concerning the subject matter hereof. The Agreement supersedes all prior or contemporaneous agreements, understandings, discussions, communications, and representations, written or verbal.

ARTICLE XII – LIABILITY

Neither Party shall be responsible for liability incurred as a result of the other Party's acts or omissions in connection with this Agreement. Any liability incurred in connection with this Agreement is subject to immunities and limitations of the New Mexico Tort Claims Act.

ARTICLE XIII – APPROPRIATIONS

The terms and conditions of this Agreement are contingent upon the New Mexico Legislature making sufficient appropriations and authorization for the performance of this Agreement. If the Legislature fails to make sufficient appropriations and authorizations, the OSE may immediately terminate this Agreement, in whole or in part, regardless of any existing legally binding third-party contracts entered into by or between the Grantee and a third party, by providing the Grantee with written notice of such early termination. Grantee shall accept the OSE's decision as to whether sufficient appropriations are available, which shall be final and non-appealable. Grantee shall include a substantively identical clause in all contracts between the Grantee and third parties that are (i) funded in whole or part by funds made available under this Agreement and (ii) entered into between the effective date of this Agreement and the Termination Date or early termination date.

ARTICLE XIV – REQUIRED TERMINATION CLAUSE

Grantee shall include the following or a substantially similar termination clause in all contracts that are (i) funded in whole or part by funds made available under this Agreement and (ii) entered into after the effective date of this Agreement:

A. "This contract is funded in whole or in part by funds made available under a State of New Mexico (State) grant agreement. If the State terminates the grant agreement, the [insert Grantee name] may terminate this contract by providing the contractor written notice of such termination in accordance with the notice provisions in this contract. In the event of termination pursuant to this paragraph, the [insert Grantee name] only liability shall be to pay the contractor for acceptable goods and/or services delivered and accepted prior to the termination date".

ARTICLE XV: GENERAL PROVISIONS

A. Assignment: Grantee's rights and obligations under this Agreement are personal and may not be transferred or assigned without the prior written consent of the OSE. Any attempt at assignment or transfer without such consent shall be void. Any assignment or transfer of Grantee's rights and obligations approved by the OSE shall be subject to the provisions of this Agreement.

B. Binding Effect: Except as otherwise provided, all provisions of this Agreement, including the benefits and burdens, shall extend to and be binding upon the Parties' respective successors and assigns.

C. Authority: Each Party represents and warrants to the other that the execution and delivery of this Agreement and the performance of such Party's obligations have been duly authorized.

D. Captions and References: The captions and headings in this Agreement are for the convenience of reference only and shall not be used to interpret, define, or limit its provisions. All references in this Agreement to sections (whether spelled out or using the § symbol), subsections, exhibits, or other attachments are references to sections, subsections, exhibits, or other attachments contained herein or incorporated as a part hereof, unless otherwise noted.

E. Counterparts: This Agreement may be executed in multiple, identical, original counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute the same agreement.

F. Digital Signatures: If any signatory signs this agreement using a digital signature in accordance with the State Policies regarding the use of digital signatures, then any agreement or consent to use digital signatures within the electronic system through which that signatory signed shall be incorporated into this Agreement by reference.

G. Modification: Except as otherwise provided in this Agreement, any modification to this Agreement shall only be effective if agreed to in a formal amendment, properly executed, and approved in accordance with applicable New Mexico law and State fiscal policies and rules. Modifications permitted under this Agreement, other than Agreement amendments, shall conform to the policies issued by the State.

H. Statutes, Regulations, Fiscal Rules, and Other Authority: Any reference in this Agreement to a statute, regulation, policy, or other authority shall be interpreted to refer to such authority then current, as may have been changed or amended after the Effective Date of this Agreement.

I. External Terms and Conditions: Notwithstanding anything to the contrary herein, the State shall not be subject to any provision included in any terms, conditions, or agreements appearing on the Grantee's or a subcontractor's website or any provision incorporated into any click-through or online agreements related to the Work unless that provision is specifically referenced in this Agreement.

J. Severability: The invalidity or unenforceability of any provision of this Agreement shall not affect the validity or enforceability of any other provision of this Agreement, which shall remain in full force and effect, provided that the Parties can continue to perform their obligations under this Agreement in accordance with its intent.

K. Survival of Certain Agreement Terms: Any provision of this Agreement that imposes an obligation on a Party after the termination or expiration of this Agreement shall survive the termination or expiration of this Agreement and shall be enforceable by the other Party.

L. Third Party Beneficiaries: Except for the Parties' respective successors and assigns described in this Agreement, it does not and is not intended to confer any rights or remedies upon any person or entity other than the Parties. Enforcement of this Agreement and all rights and obligations hereunder are reserved solely to the Parties. Any services or benefits that third parties receive as a result of this Agreement are incidental to this Agreement and do not create any rights for such third parties.

M. Waiver: A Party's failure or delay in exercising any right, power, or privilege under this Agreement, whether explicit or by lack of enforcement, shall not operate as a waiver, nor shall any single or partial exercise of any right, power, or privilege preclude any other or further exercise of such right, power, or privilege.

N. Standard and Manner of Performance: Grantee shall perform its obligations under this Agreement in accordance with the highest standards of care, skill, and diligence in Grantee's industry, trade, or profession.

O. Licenses, Permits, and Other Authorizations: Grantee shall secure, prior to the Effective Date, and maintain at all times during the term of this Agreement, at its sole expense, all licenses, certifications, permits, and other authorizations required to perform its obligations under this Agreement and shall ensure that all employees, agents, and subcontractors secure and maintain at all times during the term of their employment, agency or subcontractor, all licenses, certifications, permits and other authorizations required to perform their obligations in relation to this Agreement.

P. Venue and Choice of Law: This Agreement shall be governed by and construed in accordance with the laws of the State of New Mexico, without regard to any conflict of law provisions. Any legal suit, action, or proceeding arising out of or related to this Agreement shall be instituted exclusively in the district courts located in Santa Fe, New Mexico. The Parties hereby irrevocably submit to the exclusive jurisdiction and venue of such courts in any such suit, action, or proceeding. The Parties waive any objection to the laying of the venue of any such suit, action, or proceeding in

the district courts of Santa Fe, New Mexico, and irrevocably waive and agree not to plead or claim in any such court that any such suit, action, or proceeding brought in any such court has been brought in an inconvenient forum.

[SIGNATURE PAGE AND EXHIBITS FOLLOW]

IN WITNESS WHEREOF, the parties have duly executed this Agreement as of the OSE's date of execution.

APPROVED BY GRANTOR:

OSE Agency Head: By:_____
Title:_____ Date:_____

OSE Budget: By:_____
Title:_____ Date:_____

Chief Financial Officer: By:_____
Title:_____ Date:_____

AS TO LEGAL FORM AND SUFFICIENCY

OSE Counsel, By:_____
Title:_____ Date:_____

APPROVED BY GRANTEE:

Grantee: By:_____ Michael J. Garcia
Title: Mayor, City of Santa Fe Date:_____

Attest: By:_____ Geralyn F. Cardenas
Title: City Clerk, City of Santa Fe Date:_____

Grantee: By: ANDREA PHILLIPS (May 14, 2026 14:53:01 MDT) Andrea Phillips
Title: Finance Director, City of Santa Fe Date: May 14, 2026

AS TO LEGAL FORM AND SUFFICIENCY

Grantee: By: Marcos Martinez Marcos D. Martinez
Marcos Martinez (May 14, 2026 10:16:21 MDT)
Legal Counsel Title: City Attorney, City of Santa Fe Date: May 14, 2026

EXHIBIT A

Project Description

The purpose of the Project is to grant up to two million dollars ($2,000,000) to the Grantee to fund the reimbursement of costs associated with critical dam maintenance and improvement projects for the City of Santa Fe. The final amount of the grant funding provided by the Grantor to the Grantee will be established at the sole discretion of Grantor, but will in no instance exceed the maximum amount. Grantee shall propose allowable uses that will be subject to the review and acceptance/approval of the Grantor.

EXHIBIT B

Quarterly Progress Report

(TBD)

EXHIBIT C

Proposed Budget

(To be provided by Grantee)

EXHIBIT D

Request for Payment Form

STATE OF NEW MEXICO
GRANT APPROPRIATION
Request for Payment Form

I. Grantee Information (Must match your DFA Substitute W-9 Form)

A. Grantee: City of Santa Fe
B. Address:
(Complete Mailing, including Suite, if applicable)
City, State, Zip
C. Contact Name/Phone #: _____
D. Grant No: ZJ5134 Santa Fe Dam Projects
E. Project Title: _____
F. Grant Expiration Date: _____

II. Payment Computation

A. Payment Request No. _____
B. Grant Amount: _____
C. AIPP Amount *(If Applicable)* : _____
D. Funds Requested to Date: _____
E. Amount Requested this Payment: _____
F. Reversion Amount (*if applicable*):
G. Grant Balance: $ 0.00
H. Final Request for Payment (*if applicable*)

III. Fiscal Year : 2026 (July 1, 2025-June 30, 2026)

(The State of NM Fiscal Year is July 1, 20XX through June 30, 20XX of the following year)

IV. Certifications

I hereby certify that all conditions and requirements for Payments outlined in the Agreement have been met, including but not limited to:
a. Submission and approval of a Project Budget as per Article IV, Section A of the Agreement.
b. Compliance with the Project Budget and expenditure of funds in accordance with the State Procurement Code and the State's Model Accounting Practices.
c. Submission of supporting documentation as required by the Agreement.
d. Maintenance of all necessary records and documentation as stipulated in the Agreement.

I attest that the information provided is correct; expenditures are properly documented and valid or actual receipts, and that the activity fully complies with Article IX, Sec. 14 of the New Mexico Constitution, known as the "anti-donation" clause.

I hereby certify that all representations and warranties made in the Agreement remain true, accurate, and complete as of the date of this request, and will continue to be so throughout the term of the Agreement. I acknowledge that these representations and warranties are a material inducement for the Department to approve this pay request.

Grantee Fiscal Officer or **Fiscal Agent** (*if applicable*)

Printed Name

Date:

Grantee Representative

Printed Name

Date: _____

(State Agency Use Only)

Vendor Code: _ **Fund No.:** _____ **PO #** _ **Loc No.:** _____

I certify that the State Agency financial and vendor file information agree with the above submitted information.

ASD Officer Date

Division Grant Manager Date

DATE: May 18, 2026

TO: Governing Body
Finance Committee
Public Works and Utilities Committee

FROM: Jesse Roach, Interim Public Utilities Department Director

VIA: Andy Hopkins, Budget Officer Andy Hopkins

Erika Lujan, Grant Manager ERIKA LUJAN
ERIKA LUJAN (May 21, 2026 11:30:26 MDT)

SUBJECT: New Mexico Special Appropriation Grant Agreement

The New Mexico Office of the State Engineer has generously offered up to two million dollars ($2,000,000) in legislative appropriations to the City of Santa Fe to reimburse fiscal year 2026 costs associated with critical maintenance and improvements at Nichols Dam. The actual amount will be determined by qualifying expenses through June 30, 2026 that will not be reimbursed through any other funding mechanism. The City of Santa Fe's Public Utilities Department expects to be able to take advantage of nearly $1,300,000 of this generous offer and recommends approval of the attached NEW MEXICO SPECIAL APPROPRIATION GRANT AGREEMENT for Santa Fe Critical Dam Maintenance and Improvement Project ZJ5134.

Project Ledger information for the Nichols Dam rehabilitation project for internal accounting purposes is included on the next two pages.

City Council

Alma G. Castro, District 1
Patricia Feghali, District 1
Elizabeth "Liz" Barrett, District 2
Paul C. Bustamante, District 2
Lee Garcia, Mayor Pro Tem, District 3
Pilar F.H. Faulkner, District 3
Jamie Cassutt, District 4
Amanda Chavez, District 4

PROJECT MASTER TABLE

Project code: WTR1950508 Title: NICHOLS - OUTLET CONDUIT REHABILITA
Short title: NICHOLS DAM REH

Major Project:
Contact Names:

Status: Active
Workflow Status:
Drawdown frequency: REM
Start date: 07/01/2019 Percent complete: 0
Est completion date: Estimate to complete: 9,978,500.00
Actual completion date:04/11/2027

Comment:

1 Records printed ** End of Report **

Project	Title	Status	Start Date	End Date
WTR1950508	NICHOLS - OUTLET CONDUIT REHABILITA	Active	07/01/19	04/11/27

Expense String	Name	Status	Start Date	End Date
WTR1950508-Design--	nichols outlet conduit rehab	Active	07/01/2019	06/30/2026
WTR1950508-CONSTRUC--	NICHOLS - OUTLET CONDUIT REHAB	Active	07/01/2019	06/30/2026

Funding Source String	Name	Status	Start Date	End Date
WTR1950508-State-NMDFA-	NICHOLS DAM SAFETY REHAB	Active	07/01/2019	04/11/2027
WTR1950508-State-NMFA-	NICHOLS DAM SAFETY REHAB	Active	07/01/2019	04/11/2027
WTR1950508-INTERNAL--	NICHOLS - OUTLET CONDUIT REHAB	Active	07/01/2019	06/30/2026
WTR1950508-LOAN--	NICHOLS DAM SAFETY REHAB	Active	07/01/2019	04/11/2027

** END OF REPORT - Generated by Jesse Roach **

Date: May 5, 2026

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

From: Carly Venditti, Metropolitan Redevelopment Agency Department Deputy Director CAV

Via: Andrea Phillips, Deputy City Manager AP ANDREA PHILLIPS

RE: Approving the Midtown Metropolitan Redevelopment Area Plan

---

EXECUTIVE SUMMARY:

The proposed resolution would approve the Midtown Metropolitan Redevelopment Area Plan ("Plan") for the City of Santa Fe ("City"). Pursuant to NMSA 1978, Section 3-60A-9, the proposed resolution would determine that the Plan will help eliminate or prevent blight, conforms to the City's General Plan, and affords maximum opportunity consistent with the needs of the community for the redevelopment of the Midtown Metropolitan Redevelopment Area by private enterprises or persons. The Plan also does not include proposed activities that require displacement or relocation of any families or individuals, and a method for providing displacement or relocation accommodations is not needed. The Plan, if adopted, also delegates limited specific powers to the MRA Commission to carry out the goals of the Plan.

(See, Attachment A).

BACKGROUND:

The State of New Mexico, through the Metropolitan Redevelopment Code (NMSA 1978, Chapter 3, Article 60A, Section 1 through 49), authorizes municipalities to prepare and amend metropolitan redevelopment plans, and to undertake and carry out metropolitan redevelopment projects. The City determined that blighted conditions exist within the Midtown Local Innovation Corridor Overlay District (LINC) with the addition of Franklin Miles Park and, on June 25,2025, designated the area as a Metropolitan Redevelopment Area through Resolution No. 2025-42.

The City now seeks to formally adopt the Midtown Metropolitan Redevelopment Area Plan to guide future redevelopment efforts, with a focus on equitable development, enhanced public health and safety, and long-term economic vitality for the Midtown Metropolitan Redevelopment Area.

ATTACHMENTS:

Resolution
Fiscal Impact Report

CITY OF SANTA FE, NEW MEXICO

RESOLUTION NO. 2026-__

INTRODUCED BY:

Councilor Jamie Cassutt

Councilor Amanda Chavez

Mayor Michael Garcia

A RESOLUTION

APPROVING THE ADOPTION OF THE SANTA FE MIDTOWN METROPOLITAN REDEVELOPMENT AREA PLAN.

WHEREAS, the State of New Mexico has enacted the Metropolitan Redevelopment Code ("Code"), NMSA 1978, Chapter 3, Article 60A, Sections 1 through 49, as amended, which authorizes the City of Santa Fe, New Mexico, ("City") to prepare and amend metropolitan redevelopment plans, and to undertake and carry out metropolitan redevelopment projects; and

WHEREAS, pursuant to NMSA 1978, Section 3-60A-8, as amended, "[a] local government shall not prepare a metropolitan redevelopment plan for an area unless the local government has, by resolution, determined the area to be a slum area or a blighted area or a combination thereof and designated the area as appropriate for a metropolitan redevelopment project…"; and

WHEREAS, the City found that blighted areas exist in the Midtown Site which geographically align with the Midtown Local Innovation Corridor Overlay District (the "LINC") and officially designated the area within the LINC, with the addition of Franklin Miles Park, as a Metropolitan Redevelopment Area on June 25, 2025, through the adoption of Resolution No. 2025-

42; and

WHEREAS, consistent with NMSA 1978, Section 3-60A-8, the Governing Body will have conducted a public hearing to gather and consider public input about the Midtown Metropolitan Redevelopment Plan; and

WHEREAS, the City of Santa Fe wishes to formally adopt the Midtown Metropolitan Redevelopment Plan, attached as Exhibit A, to guide redevelopment strategies and implement recommendations that advance equitable development, improve public health and safety, and create long-term economic vitality for the Midtown Metropolitan Redevelopment Area.

NOW, THEREFORE, BE IT RESOLVED BY THE GOVERNING BODY OF THE CITY OF SANTA FE that:

A. The Midtown Metropolitan Redevelopment Area Plan proposes activities for the redevelopment of the Midtown Metropolitan Redevelopment Area that will aid in the elimination and prevention of blight; and

B. The Midtown Metropolitan Redevelopment Area Plan does not include proposed activities that require the displacement or relocation of any families and individuals from their dwellings and a method for providing displacement or relocation accommodation is not needed; and

C. The Midtown Metropolitan Redevelopment Area Plan conforms to and complements the City of Santa Fe General Plan; and

D. The Midtown Metropolitan Redevelopment Area Plan affords maximum opportunity consistent with the needs of the community for the rehabilitation or redevelopment of the Midtown Metropolitan Redevelopment Area by private enterprise or persons, and objectives of the Midtown Metropolitan Redevelopment Area Plan justify the proposed activities as public purposes and needs.

BE IT FURTHER RESOLVED that the Midtown Metropolitan Redevelopment Area

Plan as shown in the attached Exhibit A, is hereby approved.

PASSED, APPROVED, and ADOPTED this _____day of _____, 2026.

_____

MICHAEL J. GARCIA, MAYOR

ATTEST:

_____

GERALYN F. CARDENAS, CITY CLERK

APPROVED AS TO FORM:

Marcos D. Martinez

Marcos D. Martinez (May 7, 2026 16:22:39 MDT)

MARCOS D. MARTÍNEZ, CITY ATTORNEY

Legislation/2026/Resolutions/Approving the Midtown Metropolitan Redevelopment Plan

Exhibit A

SANTA FE MIDTOWN METROPOLITAN

REDEVELOPMENT PLAN

pland COLLABORATIVE

TABLE OF CONTENTS

MRA RESOLUTION 3

BACKGROUND.....4

The Santa Fe Metropolitan Redevelopment Agency 4
Metropolitan Redevelopment Agency Powers.....4
MRA Plan Purpose 5
MRA Designation.....5
Metropolitan Redevelopment Commission 6
Neighborhood Stabilization Plan.....6
MRA District Boundary 7
Previous Planning & Community Engagement 8

VISION & GOALS 10

DESIGNATION REPORT FINDINGS 11

MRA Designation Report Findings.....11
Market Study Findings 13

NATIONAL BEST PRACTICES 18

Glenview, IL.....18
Dublin, OH.....19
Boise, ID 20
Financial Tools 21

RECOMMENDATIONS & IMPLEMENTATION.....22

How Can TIF Work In Midtown? 32
Tax Increment Financing Projections 32

APPENDIX 35

Appendix Item A: Metropolitan Redevelopment Agency Powers.....36
Appendix Item B: Santa Fe Midtown Market Study 39

MRA RESOLUTION

CITY OF SANTA FE, NEW MEXICO

RESOLUTION NO. 2025-42

INTRODUCED BY:

Mayor Alan Webber

Councilor Jamie Cassutt

Councilor Amanda Chavez

A RESOLUTION

MAKING A FINDING OF NECESSITY AND DESIGNATING AN AREA COMPRISED OF A MAJORITY OF THE MIDTOWN LOCAL INNOVATION CORRIDOR OVERLAY DISTRICT AND GENERAL FRANKLIN E. MILES PARK AS A METROPOLITAN REDEVELOPMENT AREA.

WHEREAS, the New Mexico Legislature adopted a Metropolitan Redevelopment Code to, among other things, provide strategies for municipalities to finance redevelopment projects; and

WHEREAS, SFCC 1987, Section 7-2.3 provides that the City of Santa Fe ("City") can declare and designate a metropolitan development area as "appropriate for a metropolitan development project"; and

WHEREAS, SFCC 1987, Section 7-2.8**,** provides that, in order to designate an area as a metropolitan redevelopment area, the City must first adopt a resolution establishing the following two criteria: 1) the area is either a slum or blighted; and 2) rehabilitation, conservation, slum clearance, redevelopment or development, or a combination thereof in the area is necessary in the interest of the public health, safety, morals, or welfare of the residents of the city; and

WHEREAS, the Midtown Local Innovation Corridor Overlay District (the "LINC")

consists of diverse tracts of land which, according to a study commissioned by the City, the *Midtown Metropolitan Development Plan: Designation Report,* Attachment A, is characterized by deteriorated or deteriorating structures, defective or inadequate street layout, faulty lot layout, deterioration of sites or other implements, a lack of adequate housing facilities, obsolete or impractical platting, and a significant number of vacant or struggling commercial businesses, all of which are inconsistent with the described goals in SFCC 1987, Section 14-1.3 of the land-use code, to "create conditions favorable to the health, safety, convenience, prosperity and general welfare of the residents of Santa Fe by coordinating streets within proposed subdivisions with existing or planned streets or other features of the general plan; providing parks and trails; providing sewer, water and other infrastructure; providing adequate open space for traffic, recreation, drainage, light and air; and providing for the appropriate distribution of population and traffic"; and

WHEREAS, the LINC lies within two designated census tracts, 11.03 and 10.02, which as defined in 26 USCA § 1400Z–1, are "qualified opportunity zones": distressed areas, identified by the federal government as needing targeted investment in economic development; and

WHEREAS, the purpose of identifying opportunity zones was to spur economic development and job creation in distressed communities by providing tax benefits to investors; and

WHEREAS, the economically challenging conditions in these census tracts have impaired the sound growth, development, and economic well-being of the City, creating an economic and social burden detrimental to the public health, safety, and welfare of the City; and

WHEREAS, the LINC includes a multi-unit residential property, more specifically described as the area covered by Lot 3B1**,** as recorded in instrument number 1171143, Book 482, Page 35, of the Santa Fe County Clerk ("Multi-Unit Residential Property"); and

WHEREAS, as the only residential property in the LINC, the Multi-Unit Residential Property's interests and needs are distinct from the rest of the LINC; and

WHEREAS, General Franklin E. Miles Park, recorded in instrument number 622,332,

Book 173, Page 27, filed on May 14, 1987, of the Santa Fe County Clerk ("Franklin Miles Park"), is adjacent to the LINC; and

WHEREAS, Franklin Miles Park has irrigation infrastructure that is over thirty years old and past its life expectancy; ballfield light poles that have either already been removed due to deteriorating infrastructure or will need to be removed in the future due to deteriorating infrastructure; chronic presence of drug paraphernalia (such as syringes) left by drug users; and rodent damage to concession stands, restrooms, wiring, and irrigation; and

WHEREAS, Franklin Miles Park's conditions are consistent with the definition of "blight" established in SFCC 1987, Section 7-2.3; and

WHEREAS, the *Midtown Metropolitan Development Plan: Designation Report* notes on page 15 that the "absence of high-quality parks, plazas, and gathering places discourages pedestrian activity and limits opportunities for community engagement" and rehabilitating the park would help address this concern.

NOW, THEREFORE, BE IT RESOLVED THAT THE GOVERNING BODY OF THE CITY OF SANTA FE finds that a blighted area exists in the LINC, depicted in Attachment B, and the rehabilitation, conservation, and redevelopment of the area is necessary and is in the interest of the public health, safety, and welfare of the residents of the City of Santa Fe.

BE IT FURTHER RESOLVED that a blighted area exists in Franklin Miles Park, depicted on in the southwest corner of Attachment B, and which is adjacent to the LINC, and the rehabilitation, conservation and redevelopment of the park is necessary and is in the interest of the public health, safety, and welfare of the residents of the City of Santa Fe.

BE IT FURTHER RESOLVED that the area within the LINC, defined by SFCC 1987, Section 14-5.5D (2), other than the Multi-Unit Residential Property and Franklin Miles Park, are designated a Metropolitan Redevelopment Area, pursuant to SFCC 1987, Section 7-2.8, and NMSA 1978, Section 3-60A-8.

PASSED, APPROVED, and ADOPTED this 25th day of June, 2025.

Alan Webber (Jun 26, 2025 16:52 MDT)
ALAN WEBBER, MAYOR

ATTEST:

ANDREA SALAZAR (Jun 26, 2025 17:35 MDT)
ANDRÉA SALAZAR, CITY CLERK

APPROVED AS TO FORM:

Erin McSherry (Jun 26, 2025 13:38 MDT)
ERIN K. McSHERRY, CITY ATTORNEY

Legislation/2025/Resolutions/2025-42(R)/Midtown Redevelopment Area Designation

BACKGROUND

THE SANTA FE METROPOLITAN REDEVELOPMENT AGENCY

The City of Santa Fe formally established the Santa Fe Metropolitan Redevelopment (MR) Agency in 2023 recognizing the need for an agency to spearhead efforts to revitalize areas designated as slum or blighted. The agency is working along other city departments to identify potential MRA districts, assess whether those areas met the MR designation criteria, and develop a plan to address those conditions. The outcomes of a successful MRA district revitalization effort is improved public health and safety, and long-term economic vitality.

The Santa Fe MR Agency is responsible for:

- ☑ *Identifying and designating MRA districts through a public process.*
- ☑ *Developing and implementing redevelopment plans aligned with the City's comprehensive plan.*
- ☑ *Acquiring and assembling land, including vacant or underutilized properties.*
- ☑ *Partnering with public and private entities to support revitalization projects.*
- ☑ *Supporting public infrastructure improvements such as utilities, streets, and parks.*

METROPOLITAN REDEVELOPMENT AGENCY POWERS

This plan provides the agency with broad powers, as noted in 3-60A-10 of New Mexico state statute.

These powers, which only exist within MRA districts, include:

- ☑ *Executing contracts*
- ☑ *Replatting land*
- ☑ *Acquisition of real property within the metropolitan redevelopment area*

A full list of powers granted by this plan can be found in Appendix A.

EXCERPT FROM THE ENABLING STATE LEGISLATION

NM Stat § 3-60A-9 (2024) - C. Following the public hearing, the local government may approve a metropolitan redevelopment plan if it finds that:

- ☑ (1) the proposed activities will aid in the elimination or prevention of slum or blight or the conditions that lead to the development of slum or blight;
- ☑ (2) a feasible method is included in the plan to provide individuals and families who occupy residential dwellings in the metropolitan redevelopment area and who may be displaced by the proposed activities with decent, safe and sanitary dwelling accommodations within their means and without undue hardship to such individuals and families;
- ☑ (3) the plan conforms to the general plan for the local government; and
- ☑ (4) the plan affords maximum opportunity consistent with the needs of the community for the rehabilitation or redevelopment of the area by private enterprise or persons and the objectives of the plan justify the proposed activities as public purposes and needs.

MRA PLAN PURPOSE

The Midtown MRA district is a bold step toward enhancing the heart of Santa Fe. Building on years of community driven planning, this initiative will support the evolution of the Midtown District into a vibrant hub for arts, culture, economic growth, and mixed-income housing.

This plan, the Midtown Metropolitan Redevelopment Plan (Plan) establishes a roadmap to address the MRA conditions, or blight, that hinder redevelopment and economic growth. The Plan outlines redevelopment strategies and implementation recommendations that advance equitable development, improve public health and safety, and create long-term economic vitality.

The MRA district of Midtown and adjacent commercial areas will unlock key funding sources to enhance public infrastructure and attract private investment. This will create new jobs, improve walkability, and expand housing options. The creation of the MRA district was a key recommendation from the Midtown Community Development Plan and aligns with the Midtown Master Plan. It supports the vision of a mixed-use, sustainable redevelopment that includes an abundance of affordable housing.

With strategic public-private partnerships and financial tools like tax incentives and infrastructure investments, the designation of Midtown area as a MRA district will move Midtown into motion, fostering the creation of an inclusive, thriving district that serves all Santa Fe residents.

MRA DESIGNATION

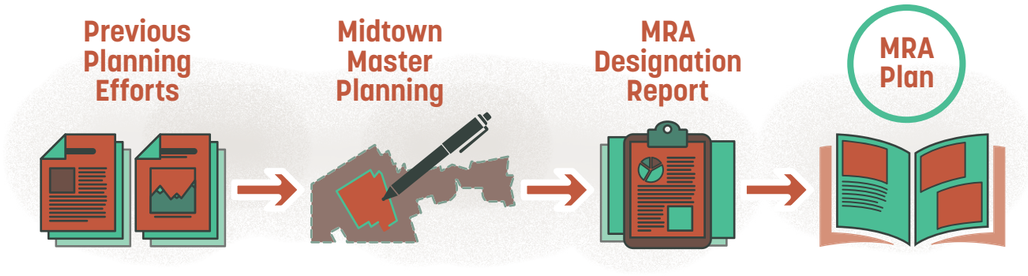
Under state and local law, the designation of an MRA requires a determination of blight as defined in Section 3-60A-4 of the New Mexico Metropolitan Redevelopment Code. A blighted area is defined as one that meets one or more of the following conditions:

- ☑ *A substantial number of deteriorated or deteriorating structures negatively impact the area's livability and economic potential.*
- ☑ *A defective or inadequate street layout that limits accessibility, walkability, and connectivity.*
- ☑ *Faulty lot layout that reduces the usefulness, accessibility, or redevelopment potential of properties.*
- ☑ *Deterioration of sites or other improvements, making the area less viable for new development.*
- ☑ *A lack of adequate housing facilities or conditions that prevent the provision of needed housing accommodations.*
- ☑ *Obsolete or impractical planning and platting, leading to underutilized land and inefficient land use.*
- ☑ *A significant number of vacant or struggling commercial businesses, reducing economic activity and job opportunities.*
- ☑ *Low levels of commercial or industrial activity, contributing to economic stagnation and disinvestment.*

A combination of these or other conditions impair economic growth and the overall well-being in the corridor and Midtown site.

With the designation of the MRA district, the City of Santa Fe unlocks tools to enhance the area

FIGURE 1. MRA PLAN DEVELOPMENT HISTORY



An aspirational illustration of the Midtown MRA district from "St. Michael's Drive: Visions of the Future"

METROPOLITAN REDEVELOPMENT COMMISSION

Santa Fe MRA districts are governed by a five-member commission appointed by the Mayor and approved by City Council. Commissioners serve staggered terms and provide oversight and guidance for all redevelopment efforts.

The MRA Commission has oversight responsibilities regarding the fiduciary and financial management and development of publicly owned real estate assets, to the extent permitted by law. The Commission brings together expertise in areas that are essential to successful redevelopment, such as public-private partnerships, economic and community development, city planning, sustainability, equity, arts and culture, and historic preservation.

The MRA Commission should reflect the communities it serves. Members should include individuals who live in or near a low-income neighborhood, represent historically marginalized communities, or bring demographic perspectives that align with the people living in or around the MRA district.

The MRA Commission has the authority to study and evaluate the best ways to finance and structure projects within its redevelopment areas. This can include planning, preserving, rehabilitating, redeveloping, developing, or managing properties the Commission oversees. The Commission can also recommend creative solutions, such as partnering with public or private organizations, and can recommend these partnerships to the Governing Body to help carry out parts of a redevelopment plan.

NEIGHBORHOOD STABILIZATION PLAN

The Midtown Community Development Plan (MCDP) (2023) identified the desire for a community driven Neighborhood Stabilization Plan (NSP) to support adjacent vulnerable neighborhoods that could be destabilized by significant new development.

In 2025, the City of Santa Fe selected a firm to carry out this plan for the Hopewell Mann Neighborhood, a community with a low median income and a high percentage of renters. The firm is engaging neighborhood residents as consultants in the planning process.

The proposal calls for the selected firm, MASS Design Group, in collaboration with Chainbreaker Collective and the Santa Fe Indigenous Center, to develop the community development engagement strategy. This will inform the NSP through a co-creation process with community organizations pursuant to the MCDP. This would include structuring and facilitating an equitable, community-driven planning partnership between the professional community development team and local community organizations to create inclusive, creative, and welcoming planning processes.

These efforts will prioritize communities that have been underrepresented in planning and public policy making, including youth and families, Spanish speaking populations, Indigenous and people of color, low-income residents, and people living in surrounding areas of Midtown.

While the focus is on the Hopewell Mann Neighborhood, the findings could potentially be applicable to surrounding neighborhoods.

MRA DISTRICT BOUNDARY

The Midtown MRA District boundary follows the boundary of the Midtown Local Innovation Corridor (LINC) Overlay District, which was adopted in 2016 (Ord. 2016-39). The Midtown LINC Overlay District was created to strengthen the built environment, foster economic growth, and enhance connectivity within Santa Fe's geographic and demographic center. It aimed to bridge the gap between the Midtown site and Christus St. Vincent Regional Medical Center by incentivizing mixed-use, pedestrian-oriented redevelopment.

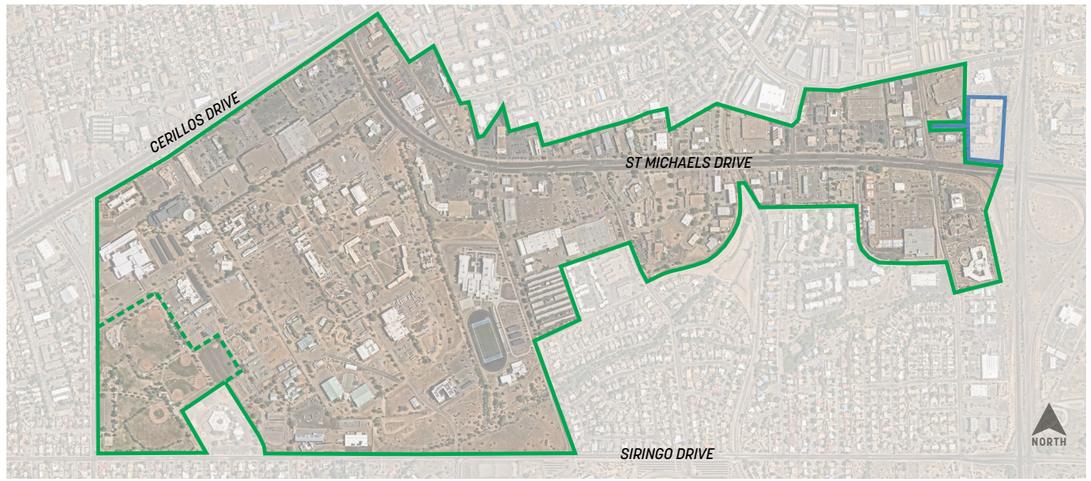
The boundary selection for the LINC district was strategic and deliberate. It excludes established residential neighborhoods to minimize disruption while incorporating 372.8 acres of primarily commercial, industrial, and institutional properties along St. Michael's Drive and Cerrillos Road, as well as the Midtown site. The intent was to free underutilized land for multi-family residential and complementary non-residential uses while maintaining zoning flexibility. Additionally, the boundary allows for higher-density development, improved multimodal transit options, and walkable public spaces, reinforcing Santa Fe's broader urban planning goals.

The Midtown MRA district aligns with the LINC Overlay boundary with two minor differences: the omission of a residential property, indicated by the blue outline in Figure 2, and the addition of General Franklin E Miles Park, indicated by the dashed green line. While there is currently no residential property within the Midtown MRA district, residential development is expected in the future.

The Midtown MRA district encompasses 182 parcels. This includes the 64-acre city-owned Midtown Redevelopment Site, formerly home to the Santa Fe University of Art and Design (SFUAD), along with the adjacent commercial corridor along St. Michael's Drive and portions of Cerrillos Road. All parcels are non-residential. However, as of September 2025, there is transitional housing located on the Midtown campus. To comply with the requirements of an MRA district, the MR Agency is collaborating with other city departments to identify other decent, safe, and sanitary facilities for these community members.

The geographic scope of the MRA extends to San Mateo Lane to the north, St. Francis Drive to the east, Siringo Road to the south, and Camino Carlos Rey and Cerillos Drive to the west as seen in Figure 2 below.

FIGURE 2. MRA DISTRICT BOUNDARY



Midtown MRA boundary map: Differences between the MRA and the LINC are the omission of the sole residential area in the north eastern corner (blue outline) and the addition of Franklin Miles Park in the southwest corner (dashed line).

PREVIOUS PLANNING & COMMUNITY ENGAGEMENT

Numerous planning initiatives, policies, and reports have shaped the vision for the Midtown MRA district, including site-specific plans, site-specific studies, and broader citywide strategies. These efforts have consistently identified key issues and reflected the community's goals and aspirations.

Building on this foundation, this MRA Plan is intended to carry those visions forward and provide a spring board for more enhancements in this important part of Santa Fe.

Table 3 provides a summary of past planning efforts, highlighting their goals, key recommendations, and links to the full documents.

Additional information about these previous plans can be found in the appendix of this document.

FIGURE 4. MIDTOWN CONCEPTUAL SITE PLAN

Conceptual site plan excerpts from the 2022 Midtown Master Plan.

FIGURE 3. MATRIX OF PREVIOUS PLANNING & COMMUNITY ENGAGEMENT

PLANNING EFFORT	PLAN GOAL	STRATEGIES & PROJECTS
St. Michael's Drive: Visions of the Future (2009)	The effort included the development of concepts by various participants focused on the combination of a re-designed roadway, as well as a new development pattern and new approach to urban design along the road.	*This effort included design concepts with lane reductions, roundabouts, and landscaped medians to calm traffic and enhance safety. Projects emphasize wide sidewalks, separated bike lanes, and complete streets to support walking and biking. Mixed-use development with 2–5 story buildings, live/work units, and creative districts are proposed. Public realm improvements include plazas, parks, tree-lined boulevards, and pedestrian promenades. Several visions include a new train station, underground parking, and stronger neighborhood connections. Sustainability tools feature solar and wind power, water harvesting, and green infrastructure. District themes center on arts, education, wellness, and transit-oriented development.*
RE:MIKE (2012)	This plan imagines a revitalized St. Michael's Drive Corridor in Santa Fe, transforming it into a more vibrant, pedestrian-friendly, and economically diverse area.	*This plan includes strategies such as fee waivers, allocation of other city resources, and special designation of zoning for economic development purposes as a result of the implementation of a multi-phased overlay district*
OVERLAY DISTRICT: MIDTOWN LINC ZONING OVERLAY (2016)	The LINC Overlay aimed to spur redevelopment of underutilized land along St. Michael's Drive by encouraging higher-density, mixed-use projects, improving connectivity between major employers, and supporting multi-family and commercial development through design standards, fee incentives, and streamlined approvals.	*As a part of this effort, fee waivers included impact, permit, utility expansion, and development review fees. These benefits are available to qualifying projects, which are required to maintain compliance for five years and are eligible for administrative approval. Parking requirements are flexible, allowing demand studies, shared parking, and use of on-street parking spaces. Zoning tools include increased height allowances (up to 50'), no density cap, reduced setbacks, and flexible use standards. Projects must use high-efficiency water fixtures. Design standards mandate wide sidewalks, landscaped buffers, screened utilities, coordinated site furnishings, and street-oriented building façades.*
OVERLAY DISTRICT: SOUTH-CENTRAL HIGHWAY CORRIDOR PROTECTION DISTRICT (SCHC) (2019)	The SCHC Overlay aimed to preserve the scenic quality and manage development within the overlay area. The SCHC imposes specific regulations on land use, density, and design to maintain the visual appeal and character of these areas.	*This offers a combination of fee incentives, flexible zoning, and design standards to encourage reinvestment and compact, mixed-use development. Tools include reduced development fees, increased building height allowances (up to 52 feet), no density cap, and reduced setbacks. Parking standards allow shared and on-street options. Design requirements focus on wide sidewalks, street-facing buildings, landscaped buffers, and pedestrian-friendly features. Projects meeting these standards are eligible for administrative approvals and are required to maintain compliance in perpetuity.*
Santa Fe Housing Report (2020)	This report was developed to analyze the challenges faced by the City of Santa Fe's housing market and provides strategies and policy recommendations for addressing them.	*The recommendations include key levers such as zoning reform, streamlined permitting, public-private partnerships, and expanded funding for affordable housing. Priority projects involve building mixed-income developments, supporting nonprofit housing providers, and converting underutilized properties into housing. The focus is on creating a more equitable, accessible housing market that meets the needs of all Santa Fe residents.*
MIDTOWN COMMUNITY DEVELOPMENT PLAN (2022)	This plan, developed as part of the Midtown Master Plan, guides new development to support community priorities like housing affordability, job access, arts and culture, and public amenities. Created with input from numerous community stakeholders, it emphasizes inclusivity, equity, and sustainability.	*This plan includes key strategies encouraging mixed-use and affordable housing development, activating public spaces, and enhancing connectivity through multi-modal infrastructure. Priority projects include new community spaces, cultural and arts programming, expanded transit access, and improvements to walking and biking networks. Levers to support implementation include zoning and land use updates, public-private partnerships, targeted infrastructure investments, and use of various financial tools. The approach focuses on aligning public investments with community goals to create a vibrant, inclusive, and economically resilient Midtown district.*
MIDTOWN PUBLIC ENGAGEMENT REPORT (2022)	The plan outlines a community-driven vision for the redevelopment of the Midtown District. Its goals are to create a vibrant, inclusive district with mixed-income housing, public spaces, arts and cultural amenities, and opportunities for education, employment, and local business growth.	*This plan includes core strategies ensuring a mix of housing types, including affordable options, preserving and expanding open space, and integrating arts, education, and cultural uses. Projects focus on adaptive reuse of existing structures, developing parks and plazas, supporting local businesses, and creating space for youth, families, and intergenerational programming. Implementation levers identified include inclusive zoning, phased redevelopment, partnerships with local institutions, and prioritizing equity, transparency, and community stewardship throughout the planning process.*
Midtown Master Plan (2022)	This plan is a roadmap for redevelopment of the former SFUAD site, encouraging a mixed-use, inclusive district with goals of housing, culture, mobility, sustainability, and community-driven economic growth.	*This plan leverages key strategies such as public–private partnerships, infrastructure upgrades, and targeted investment incentives. Proposed projects include affordable and market-rate housing, transit and bicycle improvements, civic spaces, cultural facilities, and the adaptive reuse of existing buildings. The plan prioritizes inclusive growth, sustainability, and long-term community benefits. The plan prioritizes inclusive growth, sustainability, and long-term community benefit.*

VISION & GOALS

The vision of the Midtown MRA district, as articulated in previous plans, is to transform the area into a vibrant, inclusive, and economically dynamic district that blends culture, arts, education, housing, and public spaces. Redeveloping the Midtown site will catalyze improvments throughout the MRA district.

The goals for the Midtown MRA district area:

GOAL 1: Create convenient connections and upgraded infrastructure.

Create strong non-motorized connections between the Midtown site, the MRA district, and surrounding neighborhoods to support a vibrant, mixed-use, and inclusive cultural district.

GOAL 2: Foster a high-quality built environment.

Balance preservation with progress by reusing and rehabilitating legacy buildings and cultural arts resources to maintain character and reduce waste.

GOAL 3: Improve safety.

Target lighting and crossing improvements at major gateways, transit stops, trail crossings, and other key locations within the MRA district. Encourage ground floor, street facing retail to add more "eyes on the street".

GOAL 4: Address environmental challenges through resilient design strategies.

Environmental challenges should be addressed through strategic design and infrastructure, including retrofitting the existing pond to enhance stormwater management and ecological function.

GOAL 5: Establish a better connected block layout with public spaces.

Redesign the area with smaller blocks, street-facing commercial buildings, a dense street network, and centrally located parks and plazas for the existing community, future residents and visitors.

GOAL 6: Expand housing variety and affordability.

Provide diverse and affordable housing types with a mix of incomes and unit sizes to support community growth and vitality.

GOAL 7: Vibrant and creative business activity.

Build on Midtown's central location and arts heritage by providing diverse spaces for current and emerging businesses to thrive.

Conceptual rendering of the Midtown Site from the 2022 Midtown Master Plan.

DESIGNATION REPORT FINDINGS

MRA DESIGNATION REPORT FINDINGS

The Midtown Metropolitan Redevelopment Area has been designated to tackle various challenges that have hindered its economic growth, livability, and development potential.

The findings in the MRA Designation Report identified several conditions that meet the criteria for an MRA designation under the New Mexico Metropolitan Redevelopment Code. These findings inform the redevelopment strategies and implementation recommendations outlined in this plan. The goal is to address and build upon these conditions to empower a thriving and active district that promotes future growth and opportunities for residents.

Table 4 outlines the criteria from the MRA Designation Report, summarizes the findings of the report associated with each criterion, and indicates where some of these conditions are located. These findings are integrated into the *"FIGURE 8. Implementation Table" on page 22* which address the existing challenges with strategies to eliminate blight and achieve the desired outcomes.

FIGURE 5. DESIGNATION REPORT FINDINGS

CRITERIA	LOCATION	FINDINGS
Defective or Inadequate Street Layout	St Michael's corridor	*St. Michael's Drive functions as a high-speed arterial with no bike lanes or mid-block crossings, creating unsafe pedestrian conditions, and limiting pedestrian connectivity, and access.*
	Midtown Site	*The site has only two access points, one of which lacks a traffic signal, restricting internal circulation and creating unsafe pedestrian conditions.*
	St Michael's corridor	*Lack of access between parcels impedes connectivity.*
Deteriorated or Deteriorating Structures	Midtown site	*Many buildings in the area, especially on the former SFUAD campus, are outdated, deteriorating, or structurally deficient.*
	St. Michael's corridor	*Former dormitories are not suitable for modern residential reuse due to outdated design and code deficiencies.*
	Midtown Site	*Former barracks on the southwest portion of the site remain a biohazard, preventing community use.*
	St Michael's corridor	*Sidewalks, medians, and landscaped areas are in disrepair or missing.*
	St.Michael's corridor	*Transit amenities, including bus stops, are often unsheltered and poorly maintained.*
	Midtown Site	*Public spaces are limited, poorly maintained, and uninviting for community use.*
	St Michael's corridor and Midtown Site	*Dead or overgrown landscaping contributes to visual blight.*
	Midtown Site	*Poor maintenance and lack of investment in public areas discourage gathering and reinvestment.*

CRITERIA	LOCATION	FINDINGS
Environmental Hazards	Midtown Site	*Portions of the site, such as the former barracks, contain asbestos and other contaminants.*
	Midtown Site	*Remediation costs present a substantial financial barrier to redevelopment.*
Faulty Lot Layout that Reduces Usefulness or Redevelopment Potential	St Michael's corridor	*Large, irregular parcels and excessive surface parking dominate the area.*
	St Michael's corridor	*Strip mall-style developments and outdated subdivision patterns limit the redevelopment of cohesive, mixed-use environments*
High Crime Rates and Public Safety Concerns	St Michael's corridor	*The LINC area comprises just 1.7% of Santa Fe's land area but accounts for over 7% of reported crimes, including property damage and vandalism*
	St Michael's corridor	*Safety concerns discourage public use, walkability, and private investment*
Lack of Adequate Housing Facilities or Conditions Preventing Housing Provision	St Michael's corridor	*The area lacks diverse, affordable, and mixed-income housing*
	St Michael's corridor	*Despite zoning allowances, no new residential development has occurred due to infrastructure constraints and high redevelopment costs*
Obsolete or Impractical Planning and Platting	St Michael's corridor	*Historically single-use zoning and outdated planning regulations have resulted in inefficient land use and created barriers to redevelopment*
	St Michael's corridor	*The need for updated zoning to support walkable, mixed-use development is well documented in existing plans*
Significant Number of Vacant or Struggling Commercial Properties	St Michael's corridor	*Numerous properties along St. Michael's Drive and within the Midtown site remain vacant or significantly underutilized*

Vacant lot with trash and weeds , Midtown MRA district

MARKET STUDY FINDINGS

The following section includes a summary of a market study that was conducted for the area covered by the Midtown Local Innovation Corridor Overlay District, coinciding with a MRA District for a similar zone. The study assesses economic and demographic trends in Santa Fe; analyzes recent performance of multifamily, office, hotel, and retail sectors in the Midtown LINC and surrounding areas; and estimates the pace of development for redevelopment sites within the study area.

ECONOMIC & DEMOGRAPHIC TRENDS

There are approximately 50,140 jobs in Santa Fe, 5% of which are in the Midtown LINC. The Midtown LINC has a larger share of jobs in accommodation, food services, finance, and insurance compared to the rest of the city. Overall, employment in Santa Fe decreased by approximately 170 jobs from 2010 to 2022. However, over the past decade, Santa Fe experienced significant job growth in major economic clusters like hospitality and tourism (+1,790 jobs), healthcare (+800 jobs), and information technology (+360 jobs). These same economic clusters are projected to grow over the next decade. In addition, National Labs such as Los Alamos and Sandia are driving recent and projected regional growth in energy, aerospace, and defense-related industries.

As of 2024, Santa Fe had a population of approximately 90,200. The city's population increased by nearly 30% since 2010, though the majority of growth was related to a 2014 annexation. Excluding annexations, the city's population has steadily increased since 2010. Median household income in Santa Fe is $74,200, and over 35% of Santa Fe households have annual incomes of over $100,000. Future household growth is projected to be concentrated among households earning above $100,000 annually.

MULTIFAMILY MARKET

Multifamily residential has been experiencing a boom in Santa Fe. Since 2019, an average of 446 units has been permitted in Santa Fe annually. In the year 2019 alone, 245 multifamily units were permitted – more than the combined total of multifamily units permitted in the prior 18 years. Developer interviews suggest several contributing factors to this new development momentum, including amendments to the city's affordability requirements, which allow developers to pay a fee in lieu of affordable units, post-pandemic migration to Santa Fe from around

FIGURE 6. SANTA FE TOTAL POPULATION, 2010-2022

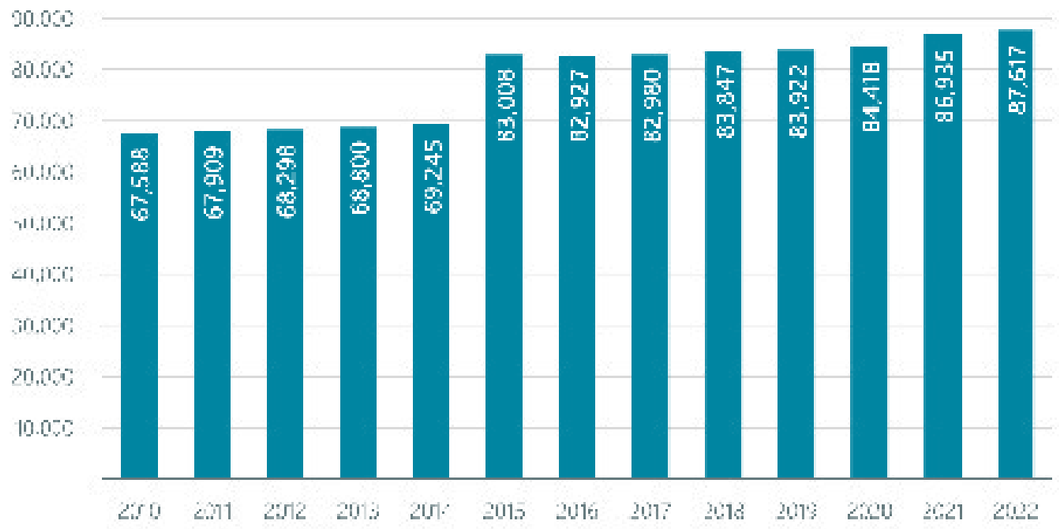
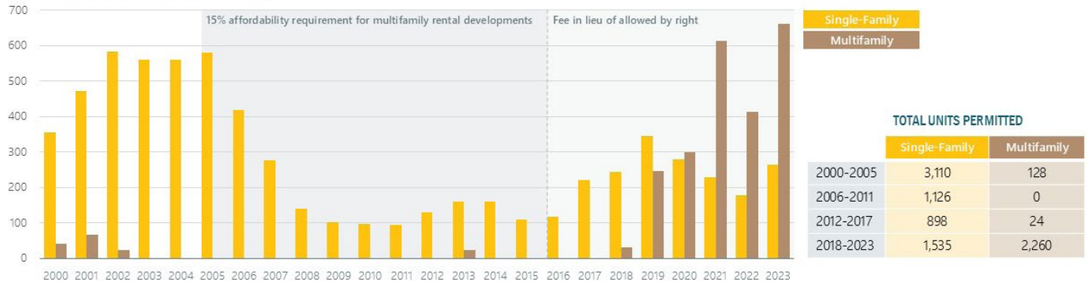


FIGURE 8. SANTA FE RESIDENTIAL UNITS PERMITTED, 2000-2023



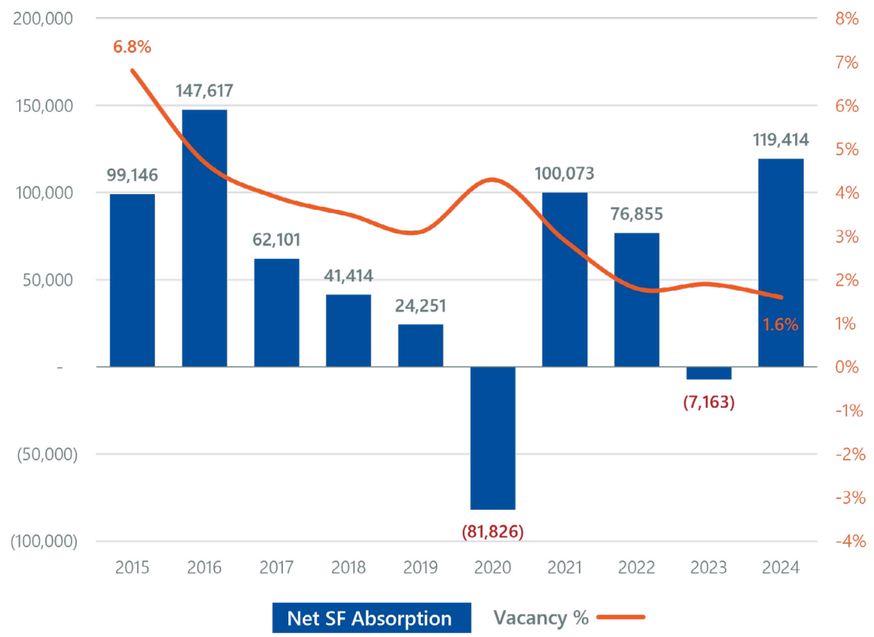
TOTAL UNITS PERMITTED

	Single-Family	Multifamily
2000-2005	3,110	128
2006-2011	1,126	0
2012-2017	898	24
2018-2023	1,535	2,260

the nation, and the continued strength of economic anchors such as the national labs.the nation, and the continued strength of economic anchors like the national labs.

Santa Fe also has 1,090 units currently under construction and an additional 4,430 units proposed. Given the unprecedented development pipeline, some real estate professionals believe the Santa Fe market-rate multifamily market may currently be overbuilt. The pace of new market-rate development may slow in the near-term to allow pipeline development to absorb, particularly with uncertainty about tariffs increasing construction costs. However, there continues to be an overall regional housing shortage – particularly affordable homes for lower- and moderate-income households. Given broader regional housing needs, multifamily is expected to remain a strong real estate market segment over the medium- to long-term and will likely be the primary development product for the Midtown campus. Developing market-rate housing along with affordable housing at the Midtown site can simultaneously create a new mixed-income neighborhood in the city and help address regional housing needs.

FIGURE 7. SANTA FE OFFICE ABSORPTION AND VACANCY, 2015-2024

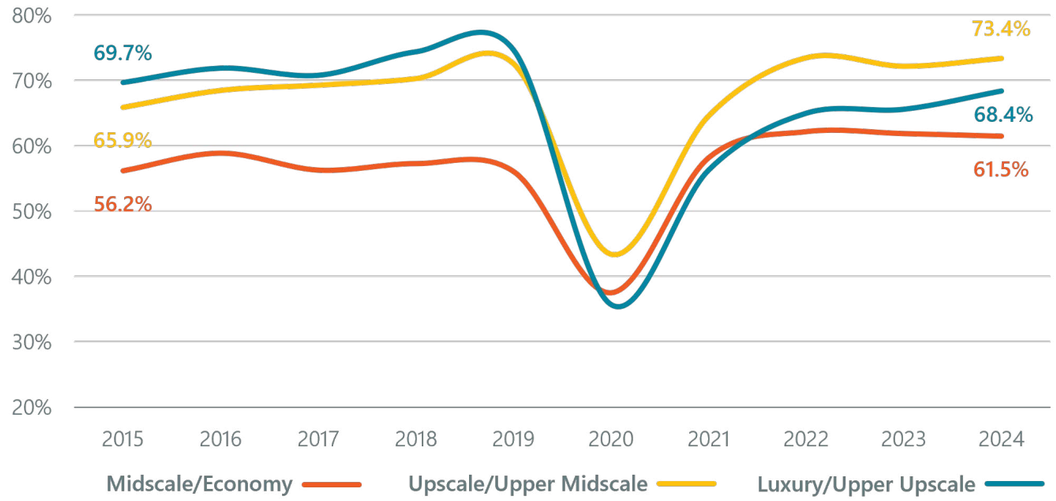


OFFICE MARKET

Recent multi-tenant office deliveries have been limited, which has led to a very low vacancy rate. While Santa Fe has over 7.16 million SF of existing office space, only 116,000 SF have been delivered since 2015. As a result, in combination with continued job growth in office-reliant economic sectors like information technology and business services, Santa Fe's office vacancy rate decreased from 6.8% in 2015 to 1.6% in 2024.

Continued absorption and a low vacancy rate indicate that Santa Fe's office market is much stronger than in many peer cities, where office performance has been persistently weak since the COVID-19 pandemic. While State and local government are part of the growth of the economy, demand for new office space is likely to be driven by medical users, National Lab spinoffs, federal agencies, and private businesses that are more willing to pay higher rents associated with new Class A office. Future demand appears to be strong for developers seeking to develop multi-tenant speculative office or larger businesses that seek a build-to-suit office development in a new, upcoming mixed-use center. While Midtown is not currently a core office market, its central location in Santa Fe and availability of land could make it a strong contender to capture future office development. Any office development at Midtown should complement the mixed-use neighborhood vision.

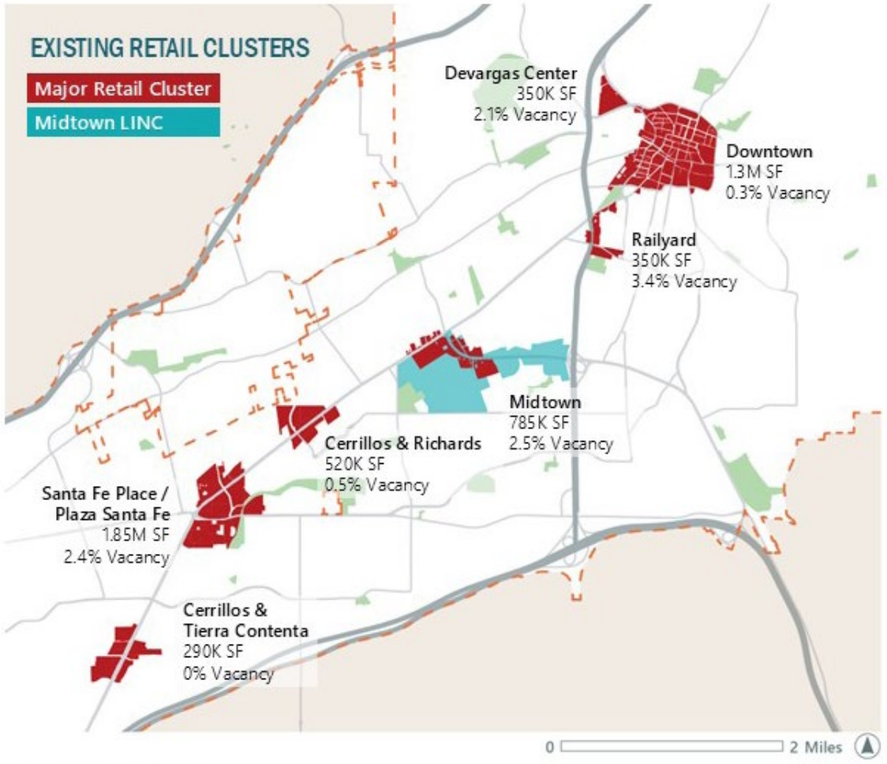
FIGURE 9. SANTA FE HOTEL OCCUPANCY BY CLASS, 2015-2024



HOTEL MARKET

Tourism is the primary driver of hotel demand in Santa Fe. Travel + Leisure readers recently voted Santa Fe as their #1 favorite city in the United States. Santa Fe's hospitality market has largely recovered post-COVID. The citywide average occupancy rate is 68%, which exceeds pre-pandemic levels. Upscale and Upper Midscale class hotels have the highest occupancy among classes (73%). The citywide average daily rate (ADR) is $182. Hotels in Santa Fe

FIGURE 10. EXISTING RETAIL CLUSTER IN SANTA FE



have experienced strong ADR growth since 2020, with the overall market average increasing from $138 in 2019 to $182 in 2024. Luxury and Upper Upscale class hotels have been the primary driver of this growth. ADR for this class grew by 41% between 2019 and 2024, while the overall market ADR increased 32% over the same period.

Hotel development could potentially be feasible at Midtown in the long run, particularly as other developments bring more activity to the area. Hotel visitors to the area could help support the retail and add to the tax base.

RETAIL MARKET

Retail is generally performing well in Santa Fe, particularly in the primary retail clusters like Midtown. Overall market vacancies continue to be low (2.3%). However, rent growth and new deliveries have both slowed in recent years. The Midtown LINC contains approximately 1.1M SF of commercial space (15.6% of Santa Fe's total commercial inventory) and has captured a roughly equivalent share of new development citywide since 2015. The broader Midtown MRA can capture additional daily needs retail development, particularly as new residential development expands the local consumer base. Sites within the Midtown campus, which lack frontage on the main roads, should also seek to attract destination retail and entertainment users that can draw customers from a wider geography for their unique offerings and experiences.

MARKET CONCLUSIONS & DEMAND PROJECTIONS

- ☑ *Multifamily development will include market-rate, mixed-income, and affordable developments.*
- ☑ *Midtown could potentially accommodate labs and other scientific offices, as well as some government offices.*
- ☑ *Midtown should include a mix of hotel types (i.e., larger conference hotels and smaller boutique hotels) to capture different travel sectors.*
- ☑ *A majority of new retail space in Midtown is likely to be ground-floor retail in mixed-use buildings, or standalone, specialty retail. Big box retail with national tenants is unlikely to locate within the core of Midtown.*

KEY TAKEAWAYS

MULTIFAMILY

- ☑ Significant recent increase in units constructed.
- ☑ Short-term slowdown, but capacity for more in the long term.

OFFICE

- ☑ Low vacancy due to limited new development.
- ☑ Demand potential from medical, lab spinoffs, and government agencies.
- ☑ New office should fit mixed-use neighborhood model.

HOTEL

- ☑ Occupancy back to pre-pandemic levels.
- ☑ Upscale and upper midscale performing best
- ☑ Long-term hotel potential.

RETAIL

- ☑ Healthy market, especially in Midtown clusters.
- ☑ Low vacancy; slowed rent growth and new construction.
- ☑ Non-frontage sites should focus on destination retail.

MARKET POTENTIAL
STRONG
TIMEFRAME
NEAR-TERM

MARKET POTENTIAL
STRONG
TIMEFRAME
MEDIUM-TERM

MARKET POTENTIAL
MODERATE
TIMEFRAME
LONG-TERM

MARKET POTENTIAL
MODERATE
TIMEFRAME
NEAR-TERM

NATIONAL BEST PRACTICES

Utilizing a MRA designation to redevelop blighted districts is a common practice employed throughout the country.

One of the many advantages of creating an MRA district is the ability to use tax increment financing as a tool to pay for infrastructure. This type of financing can also be used to implement community-driven initiatives, such as park and public space improvements, public programming, and to supplement operations and maintenance of public amenities. Below are several examples that illustrate how MRA districts can be successful.

GLENVIEW, IL

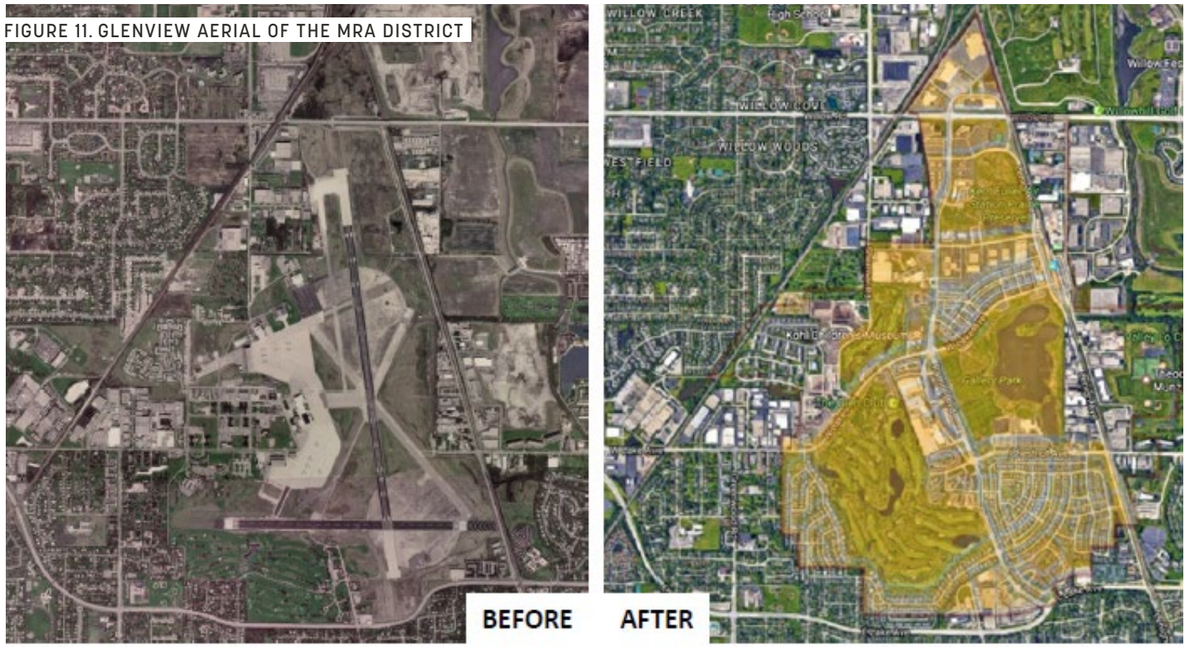
COMMUNITY SNAPSHOT

The VIllage of Glenview is a suburb of Chicago, IL with a population of approximately 50,000.

Glenview initiated a planning process to integrate a decommissioned Naval Air Station site into it's community. Upon its closure, the Air Station comprised 15% of Glenview's land area. Glenview established a 23 year MRA for the former Naval Air Station site and utilized TIF as a major funding source for their redevelopment efforts.

Similar to Midtown, this is a large campus-like site situated in a central location and adjacent to a commuter rail line.

FIGURE 11. GLENVIEW AERIAL OF THE MRA DISTRICT



Source: Google Earth; HistoricAerials.com; SB Friedman

IMPLEMENTATION

To achieve redevelopment goals, TIF financing was utilized. The TIF District is expected to generate over $800 million in revenue including $560 million from property and sales taxes, and $220 million from the sale of approximately 600 land acres to private developers. The revenue has funded approximately $183 million of roads and stormwater infrastructure.

LEVERAGING MRA TOOLS

- ☑ *Demolish remaining Naval Air Station structures, including 1.5 miles of runway and more than 100 Navy buildings*
- ☑ *Environmental remediation to clean contaminated soils, underground fuel storage tanks and dumping sites*
- ☑ *Build stormwater detention near Patriot Marketplace Retail Center*
- ☑ *Construct public improvements, including public parking structures, parks, sidewalks and streets*

KEY TAKEAWAYS

- ☑ TIF was utilized to pay for large scale infrastructure projects
- ☑ Infrastructure costs are difficult to finance without special tools or districts
- ☑ A single master developer, in this case the city, was essential to project success
- ☑ TIF can be leveraged to create a high rate of return on public investment

Before and after images of the Bridge Street District.

DUBLIN, OH

COMMUNITY SNAPSHOT

Dublin, Ohio is a suburb of Columbus, OH with a population of 49,328.

To stay competitive, City of Dublin recognized the need to innovate, creating a vision for an urban, walkable community that they called the Bridge Street District. This included more than 30 acres of land along the Scioto River in 2012 - previously the site of a struggling strip mall and driving range.

IMPLEMENTATION

To bring this vision to life, the city utilized TIF financing to develop 1,700 parking spaces and a significant portion of the road network for the development. The city also invested in public works projects that support the Bridge Street District including the relocation of roadways and roundabouts, and an iconic pedestrian bridge.

Bridge Park is now a well-known destination in central Ohio, allowing visitors, residents and office users to enjoy a once underutilized space. The $500 million+ private investment includes the development of Class A office and retail/restaurant space, for-rent residential units, for-sale condos/ townhomes, an events center and public park.

LEVERAGING MRA TOOLS

- ☑ *Built structured parking to support private development*
- ☑ *Constructed public spaces and parks to create community benefit*
- ☑ *Financed and constructed road network*

KEY TAKEAWAYS

- ☑ TIF financing was utilized to develop infrastructure
- ☑ Redeveloping the large site relied on strong public–private partnerships
- ☑ Attracting a mix of uses created a more vibrant development

BOISE, ID

COMMUNITY SNAPSHOT

The River Myrtle–Old Boise (RMOB) District is a centrally located area in downtown Boise, ID. When established in 1996, the district consisted largely of vacant land, aging warehouses, and remnants of industrial uses. The district was created to ensure that downtown Boise remained the region's hub for business, government, culture, education, and urban living—similar to the Midtown site in its central location and potential for transformation.

IMPLEMENTATION

To support redevelopment goals, Boise's urban renewal agency, the Capital City Development Corporation (CCDC), utilized tax increment financing (referred to as revenue allocation in Idaho). The financing has enabled strategic public investments in infrastructure and streetscapes that have spurred private development and helped transform the RMOB District into a vibrant, mixed-use urban neighborhood.

HOW THE MRA DESIGNATION FUNCTIONS

- ☑ *Improved streetscapes to enhance the safety and functionality of the rights-of-way*
- ☑ *Park Improvements: A partnership with the local Parks department to upgrade a park.*
- ☑ *Built public spaces that celebrated the neighborhood's multicultural history, providing additional event space to support street festivals, and catalyzes placemaking with adjacent private investment and overall neighborhood investment strategy.*

Rebuild Old Boise Blocks project: Grove Street in Boise between 4th Street and 5th Street, looking west.

KEY TAKEAWAYS

- ☑ TIF investments spurred private development
- ☑ TIF served as a key tool to fill financing gaps
- ☑ Redevelopment utilized a mix of capital sources

FINANCIAL TOOLS

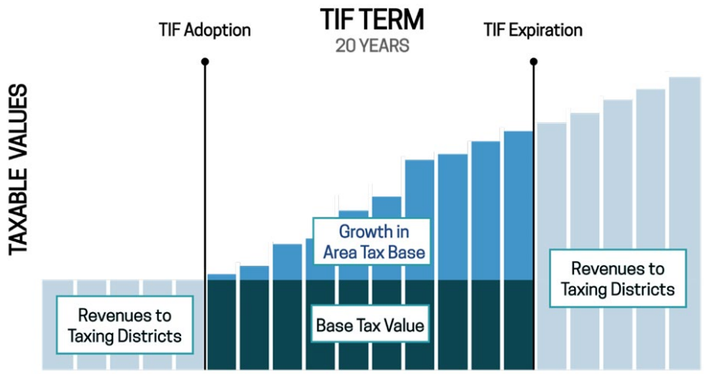
There are several local, state and federal sources that could be used to pay for improvements within the Midtown MRA district. One of the responsibilities of the Metropolitan Redevelopment Agency will be to apply for these sources or establish funding mechanisms that could fund area-wide improvements.

OPPORTUNITY ZONE

The census tract that encompasses the Midtown LINC area is a designated Opportunity Zone (OZ), an area where new investments may be eligible for preferential tax treatment. The program provides deferred or reduced taxes on capital gains from investments in OZs. Projects such as commercial and industrial real estate, housing, infrastructure, and existing or start-up business investments can all produce OZ tax benefit.

TAX INCREMENT FINANCING

Tax increment financing is a flexible, public-private finance tool used by local governments across the country. TIF allocates future increases in taxes from a designated area, or TIF District, to pay for improvements within that area. Generally, the purpose of TIF is to eliminate blight through redevelopment, foster economic development, and enhance the local tax base. In New Mexico, TIF districts may only be established within existing Metropolitan Redevelopment Areas with plans approved by the local government.



In 2024, the State of New Mexico approved changes to the State Metropolitan Redevelopment Area statute to create an enhanced TIF mechanism. The changes now allow for TIF districts to capture a portion of incremental gross receipts tax (GRT) and property tax revenue generated within the district. With the changes to State law, a TIF could collect up to 75% of incremental property and gross receipts taxes generated from the municipality, county and state within a TIF District for up to 20 years. Participation rates are subject to municipal, county and state approval, and could be less than 75% depending on taxing jurisdiction needs and redevelopment goals. Over the TIF period, school, water and other special taxing districts continue to collect their regular tax rate and immediately benefit from growth in the tax base.

TAX INCREMENT DEVELOPMENT DISTRICT

A Tax Increment Development District (TIDD) is a designated area that captures a portion of incremental gross receipts or property tax revenue to finance public infrastructure projects like roads and utilities. A TIDD functions similarly to a TIF. However, for a TIDD to be established, a majority of the property owners in the district must be in favor of the TIDD. Unlike TIFs, which have more flexibility, TIDD funds can only be spent on infrastructure. Lastly, a TIDD relies on tax increases paid by property owners to fund district-wide improvements.

RECOMMENDATIONS & IMPLEMENTATION

The Midtown MRA district and its surrounding neighborhoods are vibrant and diverse, rich with unique assets and poised to grow as an inclusive cultural and economic hub. The following implementation table organizes specific strategies and projects aligned under key goals developed to realize this potential and address the MRA designation criteria. Each goal reflects a targeted approach to foster connectivity, strengthen the built environment, improve safety, promote environmental resilience, encourage thoughtful urban design, expand housing diversity and affordability, and support thriving local businesses for the people of Santa Fe. They also directly respond to the criteria for MRA district designation.

These targeted interventions are designed to support the evolution of this dynamic district. Each action item is paired with implementation partners and the specific geographic areas within the MRA where it applies—providing a clear roadmap for coordinated, phased revitalization. This framework is intended to guide public and private investment, align resources, and support long-term redevelopment success.

FIGURE 12. IMPLEMENTATION TABLE

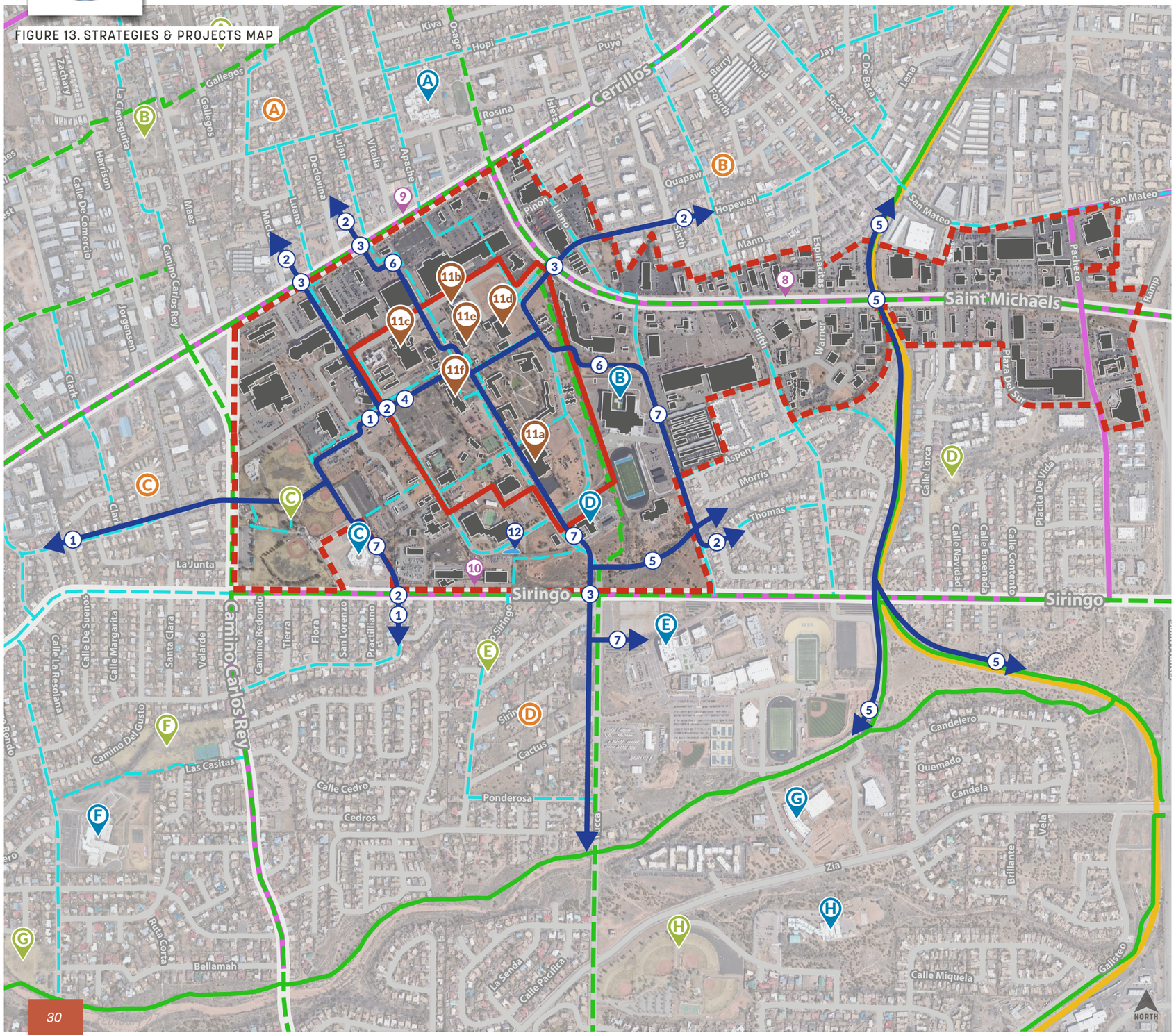
STRATEGIES & PROJECTS	TYPE	LOCATION	PARTNERS	FUNDING	MAP #
GOAL 1: Create convenient connections and upgraded infrastructure. Create strong non-motorized connections between the Midtown site, the MRA district, and surrounding neighborhoods to support a vibrant, mixed-use, and inclusive cultural district. *MRA Criteria Addressed: Defective or Inadequate Street Layout; Obsolete or Impractical Planning and Platting*					
Incorporate Green Stormwater Infrastructure (GSI) as part of every new development	*Infrastructure*	Throughout MRA	*City of Santa Fe, private developers*	*Tax Increment Financing (TIF), Community Development Block Grant (CDBG), Local Capital Improvement Funds, Clean Water State Revolving Fund (CWSRF), Water Infrastructure Finance and Innovation Act (WIFIA), Section 319 Nonpoint Source Grant Program*	*NA*
Enhance connections between General Franklin E Miles Park and the Midtown Site	*Infrastructure*	Midtown Site	*City of Santa Fe, State of New Mexico*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, Santa Fe Community Foundation Grants*	*1*
Enhance connectivity within and around the Midtown site by improving safe, accessible pedestrian and bicycle infrastructure that supports daily physical activity, promotes community health, and strengthens links to surrounding neighborhoods, parks, and key destinations.	*Infrastructure*	Throughout MRA	*City of Santa Fe*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, Santa Fe Community Foundation Grants*	*NA*
Improve bicycle and pedestrian connectivity between the Midtown site, Hopewell-Mann and other neighborhoods to the north, east, south	*Infrastructure*	Midtown Site	*City of Santa Fe*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, Transportation Alternatives program (TAP), Recreational Trails Program (RTP), NM Match Fund*	*2*
Improve bicycle and pedestrian connectivity at intersections on Cerrillos Rd., St. Michael's Dr., and Siringo Rd.	*Infrastructure*	Throughout MRA	*City of Santa Fe*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, TAP, RTP, NM Match Fund*	*3*
Improve bicycle and pedestrian connectivity between the Midtown site and General Franklin E Miles Park	*Infrastructure*	Midtown Site	*City of Santa Fe*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, TAP, RTP, NM Match Fund, Santa Fe Community Foundation Grants*	*4*
Improve bicycle and pedestrian connectivity between the St. Michael's corridor and the Arroyo de Los Chamisos Trail, Rail Trail and other regional trails.	*Infrastructure*	Throughout MRA	*City of Santa Fe*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, TAP, RTP, NM Match Fund, Santa Fe Community Foundation Grants*	*5*
Work with nearby property owners to determine the desirability and feasibility of "Soft Connections" that improve convenience, safety, and comfort of people accessing the Midtown site by walking, rolling and riding bikes	*Infrastructure*	Throughout MRA	*Private property owners*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, TAP, RTP, NM Match Fund, Santa Fe Community Foundation Grants*	*6*

STRATEGIES & PROJECTS	TYPE	LOCATION	PARTNERS	FUNDING	MAP #
Establish pedestrian and bicycle connections to educational institutions including Nava Elementary School, Santa Fe High School, Milagro Middle School, NM Highland University Center, as well as adjacent City-owned parcels.	*Infrastructure*	Throughout MRA	*Santa Fe Public Schools, City of Santa Fe*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, TAP, RTP, NM Match Fund*	*7*
Improve access to community-serving uses at the Site, such as the new Library, by providing safe and convenient routes for walking, rolling, and bicycling from surrounding neighborhoods.	*Infrastructure*	Throughout MRA	*City of Santa Fe*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, TAP, RTP, NM Match Fund, Santa Fe Community Foundation Grants*	*NA*
Enhance personal and traffic safety in areas where people are or could be physically active.	*Infrastructure*	Throughout MRA	*City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds,TAP, RTP, NM Match Fund, AARP Community Challenge Grant*	*NA*
Prioritize pedestrians and cyclists over vehicles.	*Infrastructure*	Throughout MRA	*Private developers, City of Santa Fe*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, TAP, RTP, NM Match Fund, AARP Community Challenge Grant*	*NA*
Deliver internal connectivity for people walking.	*Infrastructure*	Midtown Site	*Private developers, City of Santa Fe*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, TAP, RTP, NM Match Fund, AARP Community Challenge Grant*	*NA*
Improve access to transit on St. Michael's Dr., Cerrillos Rd. and Siringo Rd.	*Infrastructure*	Throughout MRA	*City of Santa Fe*	*TIF, Trails+ Grant Program, CDBG, Local Capital Improvement Funds, TAP, RTP, NM Match Fund, Santa Fe Community Foundation Grants*	*8, 9, 10*
Minimize cut-through traffic.	*Infastructure*	Midtown Site	*City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds,TAP, NM Match Fund*	*NA*
GOAL 2: Foster a high-quality built environment. Balance preservation with progress by reusing and rehabilitating existing buildings and cultural arts resources to maintain character and reduce waste. *MRA Criteria Addressed: Significant Number of Vacant or Struggling Commercial Properties; Deteriorated or Deteriorating Structures*					
Rehabilitate and reuse existing buildings and cultural resources where feasible. On the Midtown site, this includes but is not limited to the following: • *Greer Garson Studio Complex* • *Greer Garson Theatre Center* • *Visual Arts Center* • *Fogelson Library Complex* • *Benildus Hall* • *Administration Building*	*Infrastructure*	Midtown Site	*Private developers, non-profits, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, Private Donations, NM Match Fund*	*11a, 11b, 11c, 11d, 11e, 11f*
Replace buildings that have reached the end of their useful life with new, more sustainable buildings.	*Infrastructure*	Throughout MRA	*Private developers, non-profits, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, Private Donations, NM Match Fund*	*NA*

STRATEGIES & PROJECTS	TYPE	LOCATION	PARTNERS	FUNDING	MAP #
GOAL 3: Improve safety. Target lighting and crossing improvements at major gateways, transit stops, trail crossings, and other key locations within the MRA district. Encourage ground floor, street facing retail to add more "eyes on the street". *MRA Criteria Addressed: High Crime Rates and Public Safety Concerns*					
Enhance Safety through consistent site lighting.	*Infrastructure*	Throughout MRA	*Private property owners, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, AARP Community Challenge Grant*	*NA*
Assess and enhance pedestrian level lights.	*Infrastructure*	Throughout MRA	*Private property owners, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, AARP Community Challenge Grant*	*NA*
Prioritize high pedestrian and vehicle traffic areas, both current and planned.	*Infrastructure*	Throughout MRA	*Private property owners, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, AARP Community Challenge Grant*	*NA*
GOAL 4: Address environmental challenges through resilient design strategies. Environmental challenges should be addressed through strategic design and infrastructure, including retrofitting the existing pond to enhance stormwater management and ecological function. *MRA Criteria Addressed: Environmental Hazards; Obsolete or Impractical Planning and Platting*					
Retrofit the existing pond in the southern portion of the Midtown site to enhance stormwater management capacity, support biodiversity, and create a visible green amenity for the community.	*Infrastructure*	Midtown Site	*City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, CWSRF, WIFIA, Section 319 Nonpoint Source Grant Program*	*12*
Adopt infrastructure and green building practices that prioritize energy efficiency, reduce greenhouse gas emissions, and expand the use of renewable, clean energy sources in both new construction and building retrofits.	*Infrastructure*	Throughout MRA	*City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, CWSRF, WIFIA, Section 319 Nonpoint Source Grant Program*	*NA*
Integrate green stormwater infrastructure (GSI)—such as rain gardens, permeable pavement, and bioswales—into every new development to manage runoff, improve water quality, and enhance the public realm.	*Infrastructure*	Throughout MRA	*City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, CWSRF, WIFIA, Section 319 Nonpoint Source Grant Program*	*NA*
GOAL 5: Establish a better connected block layout with public spaces. Redesign the area with smaller blocks, street-facing commercial buildings, a dense street network, and centrally located parks and plazas. *MRA Criteria Addressed: Defective or Inadequate Street Layout; Faulty Lot Layout that Reduces Usefulness or Redevelopment Potential; Obsolete or Impractical Planning and Platting*					
Create and implement a Parking Demand Management Strategy to provide options and tools that reduce the amount of parking needed for development.	*Connectivity*	Throughout MRA	*Private property owners, developers, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, NM Match Fund*	*NA*
Narrow existing roads and when building new roads, make them more narrow.	*Land Use*	Throughout MRA	*City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, NM Match Fund*	*NA*

STRATEGIES & PROJECTS	TYPE	LOCATION	PARTNERS	FUNDING	MAP #
Development and redevelopment along Cerrillos Road and St. Michael's Drive should provide greater density of commercial uses and more housing closer to the right of way.	*Land Use*	Throughout MRA	*City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, NM Match Fund*	*NA*
GOAL 6: Expand housing variety and affordability. Provide diverse and affordable housing types with a mix of incomes and unit sizes to support community growth and vitality. *MRA Criteria Addressed: Lack of Adequate Housing Facilities or Conditions Preventing Housing Provision*					
Provide a minimum of 30% of the homes developed within the Midtown Master Plan area as affordable for low- and moderate-income households.	*Land Use*	Midtown Site	*Private developers, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, NM Match Fund*	*NA*
Dedicate space for 100 percent affordable homes, using such tools as low-income housing tax credits, construction and operating subsidies, and other incentives, with long-term affordability controls through financing terms, land trusts, or other deed restrictions.	*Land Use*	Midtown Site	*Private developers, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, NM Match Fund*	*NA*
Pass legislation to require in-lieu-of fees paid within the MRA to be invested in the Midtown Master Plan Area or within the Midtown LINC zoning area.	*Land Use*	Throughout MRA	*Private developers, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, NM Match Fund*	*NA*
Strengthen, incentivize, and increase the capacity of non-profit and community organizations to develop affordable housing that focuses on community stabilization of adjacent neighborhoods.	*Land Use*	Throughout MRA	*Private developers, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, NM Match Fund*	*NA*
GOAL 7: Vibrant and creative business activity. Build on Midtown's central location and arts heritage by providing diverse spaces for current and emerging businesses to thrive. *MRA Criteria Addressed: Significant Number of Vacant or Struggling Commercial Properties*					
Prioritize resources from the Office of Economic Development to facilitate business location and development in the Midtown District.	*Economic Development*	Midtown Site	*Private developers, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, NM Match Fund*	*NA*
Focus disposition for commercial development on industries that establish a creative technology, entertainment, arts, and culture center in Santa Fe, including Film and Multi-media; Technology; Community Arts & Culture (including food); Entertainment; Entrepreneurialism; Locally owned small businesses.	*Economic Development*	Throughout MRA	*Private developers, City of Santa Fe*	*TIF, CDBG, Local Capital Improvement Funds, NM Match Fund*	*NA*

FIGURE 13. STRATEGIES & PROJECTS MAP



The following map items highlight place-based strategies and goals outlined in the preceding table.

STRATEGIES & PROJECTS

1. Enhance connections between General Franklin E Miles Park, Midtown Site
2. Improve bicycle and pedestrian connectivity between the Midtown site, Hopewell-Mann, other neighborhoods
3. Improve bicycle and pedestrian connectivity at intersections on Cerrillos Rd., St. Michael's Dr., and Siringo Rd.
4. Improve bicycle and pedestrian connectivity between the Midtown site and General Franklin E Miles Park
5. Improve bicycle and pedestrian connectivity between the St. Michael's corridor and the Arroyo de Los Chamisos Trail, Rail Trail and other regional trails.
6. Work with nearby property owners on "Soft Connections" that improve pedestrian access to Midtown.
7. Establish pedestrian and bicycle connections to educational institutions, as well as adjacent City-owned parcels.
8. Improve access to transit on St. Michael's Dr., Cerrillos Rd. and Siringo Rd.
9. Improve access to transit on Cerrillos Rd.
10. Improve access to transit on Siringo Rd
11. Rehabilitate and reuse existing buildings and cultural resources where feasible. On the Midtown site, this includes but is not limited to the following:
    a. *Greer Garson Studio Complex*
    b. *Greer Garson Theatre Center*
    c. *Visual Arts Center*
    d. *Fogelson Library Complex*
    e. *Benildus Hall*
    f. *Administration Building*
12. Retrofit existing pond in the southern portion of the Midtown site.

MAP LEGEND

TRANSPORTATION

BUS ROUTE
- Rail Runner and Rail Trail
- Neighborhood Shared Route
- Regional Trail
- Regional Shared Route

SITE FEATURES & BOUNDARIES
- Existing Pond
- Midtown Site Boundary
- MRA Boundary

NEIGHBORHOODS
A. Casa Alegre
B. Hopewell Mann
C. Midtown
D. Rancho Siringo

PARKS
A. Cielo Vista
B. Los Hermanos Rodriguez
C. General Franklin E. Miles
D. Southridge Calle Lorca
E. Rancho Siringo
F. Herb Martinez
G. Monica Lucero
H. Ragle

SCHOOLS
A. Salazar Elementary
B. Milagro Middle
C. Nava Elementary
D. New Mexico Highlands University Center
E. Santa Fe High
F. Kearny Elementary
G. Early College Opportunities High School
H. Chaparral Elementary

As part of the implementation strategy, an assessment of available financing tools has identified Tax Increment Financing as a leading option. TIF offers a powerful mechanism to help fund critical infrastructure improvements while capturing the long-term benefits of economic growth and reinvestment in the area.

HOW CAN TIF WORK IN MIDTOWN?

TIF districts can provide communities the funds necessary to implement the strategic goals outlined in their redevelopment plans. By attracting investment that would not occur without tax increment financing, the Metropolitan Redevelopment Agency can help catalyze economic growth and increase the long-term tax base for all jurisdictions.

A Midtown TIF district could help facilitate the redevelopment of Midtown by generating the funding necessary to rehabilitate the area in alignment with community needs and existing plans for the site. TIF could finance efforts by the Metropolitan Redevelopment Agency to address key considerations identified in the Midtown Master Plan, which include connectivity and mobility, integrated stormwater management, civic and open space, and affordable housing.

More specifically, TIF could serve as a critical source of funds for the following:

- ☑ *Catalytic public infrastructure including streets and utilities that would make Midtown parcels development-ready;*
- ☑ *Plazas and open space;*
- ☑ *Public assistance for affordable housing;*
- ☑ *Gap financing for parking structures and other extraordinary development costs; and*
- ☑ *Renovation and rehabilitation of existing structures for adaptive reuse.*

TAX INCREMENT FINANCING PROJECTIONS

For the purposes of this plan, TIF revenues were projected for the Midtown MRA boundary. If approved, initial projections indicate that a new TIF district encompassing the proposed Midtown MRA could generate approximately $190.0 million in TIF revenue (including gross receipts taxes from construction) over 20 years for use on eligible costs within the district. Annual tax revenue collected by the MRA is projected to range from approximately $376,000 to $11.1 million annually in the first ten years of the TIF, and up to $17.3 million in the final year of the TIF. This 20-year revenue stream would provide the opportunity for significant public investment and economic development programming.

FIGURE 14. MIDTOWN MRA TIF REVENUE PROJECTIONS

REVENUE PROJECTION ASSUMPTIONS

TIF revenue is generated through inflationary property value growth on existing properties, growth of gross receipts due to inflation or increased sales, or new development which generates additional property and gross receipts tax revenue. The TIF revenue projections are based on a series of assumptions. Current property and gross receipts tax rates are assumed to remain constant throughout the entire analysis period. In addition, it is assumed that the participating taxing districts — the City, the County, and the State — all contribute 50% of their incremental revenues generated within the district to the TIF.

Additional assumptions relate to property tax and gross receipts tax growth rates over time, as well as new development within in the district. Stabilized growth rate assumptions for existing property and current commercial activity are based on historic growth observed or estimated for the Midtown MRA boundary. Future development and phasing assumptions are based on preliminary development proposals received by the Metropolitan Redevelopment Agency, as well as market demand analysis conducted by SB Friedman.

FIGURE 15. DRIVERS OF GROWTH

Drivers of Growth	
Property Tax Base (2025)	$70.0 Million
GRT Base (202)	$276.1 Million
Stabilized Property Tax Annual Growth Rate	2.43%
Stabilized GRT Annual Growth Rate	2.50%
New Development	Preliminary Development Interest

TAKEAWAYS

A TIF that encompasses the Midtown MRA could generate significant revenues to fund the rehabilitation and redevelopment of Midtown in accordance with community needs and existing policies and plans. However, because TIF relies in large part on new development to generate funding, most of the revenue from a Midtown MRA TIF would likely be generated in the last ten years of the TIF.

The new TIF revenues give the City multiple options to fund redevelopment. The City could choose to enter into public-private partnerships with developers to advance priority development projects and fund extraordinary development costs that are often not covered by the private sector, such as environmental remediation, higher shares of affordable housing, and public infrastructure associated with new development. The city could also issue bonds against these revenues to pay for needed public infrastructure, such as streets, parks, and plazas, to establish the public realm framework and make parcels within the Midtown site development-ready.

APPENDIX

APPENDIX ITEM A: METROPOLITAN REDEVELOPMENT POWERS

This plan provides the agency with broad powers, as noted in 3-60A-10 of New Mexico state statute.

These powers, which only exist within the MRA district, include:

- ☑ **A.** *Undertaking and carrying out metropolitan redevelopment projects, including clearance and redevelopment, rehabilitation, conservation and development activities and programs; to make, enter into and execute contracts up to $200,000 and other agreements and instruments necessary or convenient to the exercise of its powers under the Redevelopment Law;*

- ☑ **B.** *Agree to conditions that it may deem reasonable and appropriate that are attached to federal financial assistance and imposed pursuant to federal law, including conditions relating to the determination of prevailing salaries or wages or compliance with federal and state labor standards, compliance with federal property acquisition policy; and to include in a contract let in connection with the project provisions to fulfill these conditions as it may deem reasonable and appropriate; provided, however, that all purchases of personal property shall be in accordance with the **City of Santa Fe** Procurement Code;*

- ☑ **C.** *Inspect any building or property in a metropolitan redevelopment area in order to make surveys, appraisals, soundings or test borings and; to acquire, by purchase, lease, option, devise or otherwise, any real property or personal property for its administrative or project purposes, together with any improvements thereon;*

- ☑ *Prepare for redevelopment any such property; to insure or provide for the insurance of real or personal property or operations of the local government against risks or hazards, including the power to pay premiums on that insurance; and to enter into contracts necessary to effectuate the purposes of the Metropolitan Redevelopment Code up to **$200,00 in value**;*

- ☑ **D.** *Apply for money subject to those procedures and limitations as may be provided in the constitution of New Mexico or statutes and to apply for and accept advances, loans, grants, contributions and other forms of financial assistance from the federal government, the state, the county or other public body or from sources, public or private, for the purposes of the Metropolitan Redevelopment Code **subject to approval and ratification by Governing Body**;*

- ☑ *A local government may include in a contract for financial assistance with the federal government for a metropolitan redevelopment project conditions imposed pursuant to federal law that the local government may deem reasonable or appropriate and that are not inconsistent with the purposes of the Metropolitan Redevelopment Code;*

- ☑ **E.** *Make plans necessary for the carrying out of the purposes of the Metropolitan Redevelopment Code and to contract with any person, public or private, in making and carrying out such plans and to adopt or approve, modify and amend the plans following community engagement. The plans may include without limitation:*

  - ☑ *(1) redevelopment plans for specific areas;*

  - ☑ *(2) plans for programs of voluntary or assisted repair and rehabilitation of buildings and improvements;*

  - ☑ *(3) appraisals, title searches, surveys, studies and other preliminary plans and work necessary to prepare for the undertaking of metropolitan redevelopment projects;*

- ☑ **F.** *Develop, test and report methods and techniques and carry out demonstrations and other activities for the prevention and elimination of blight and to pay for, accept and use grants of funds from the federal government for those purposes;*

- ☑ **G.** *Appropriate under existing authority the funds and make expenditures necessary to carry out the purposes of the Metropolitan Redevelopment Code and under existing authority to; to close, vacate, plan or replan streets, roads, sidewalks, ways or other places; in accordance with applicable law or ordinances, to plan or replan; and to enter into agreements with a metropolitan redevelopment agency vested with metropolitan redevelopment project powers, which agreements may extend over any period, notwithstanding any provision or rule of law to the contrary, respecting action to be taken by the local government pursuant to the powers granted by the Redevelopment Law;*

- ☑ **H.** *Organize, coordinate and direct the administration of the provisions of the Redevelopment Law as they apply to the local government in order that the objective of remedying blighted areas and preventing the causes of those areas within the jurisdiction of the local government may be most effectively promoted and achieved;*

- ☑ **I.** *Acquire real property that is appropriate for the preservation or restoration of historic sites; the beautification of urban land; the conservation of open spaces, natural resources; or the provision of recreational opportunities; or that is to be used for public purposes as **limited by their contracting authority**;*

- ☑ **J.** ***May** engage in the following activities as part of a metropolitan redevelopment project:*

  - ☑ *(1) special projects directed to the removal of materials and architectural barriers that restrict the mobility and accessibility of elderly and disabled persons;*

  - ☑ *(2) provision of public services in the metropolitan redevelopment area that are not otherwise available in the area, including the provisions of public services directed to the employment, economic development, crime prevention, childcare, health, drug abuse, welfare or recreation needs of the people who reside in the metropolitan redevelopment area;*

  - ☑ *(3) payment of the nonfederal share of any federal grant-in-aid program to the local government that will be a part of a metropolitan redevelopment project;*

  - ☑ *4) payment of reasonable administrative costs and carrying charges related to the planning and execution of plans and projects;*

- ☑ **K.** *In a metropolitan redevelopment project or rehabilitation or conservation undertaking or activity, to exercise the following powers in one or more metropolitan redevelopment areas to include the elimination and prevention of the development or spread of blight and may involve redevelopment in that area or rehabilitation or conservation in that area or any combination or part of those areas in accordance with a metropolitan redevelopment plan and for undertakings or activities of a local government in a metropolitan redevelopment area to eliminate the conditions that caused an area to be so designated and may include the following:*

  - ☑ *(1) clearing the land, grading the land the land in accordance with the metropolitan redevelopment plan;*

  - ☑ *(2) making the land available for development by private enterprise or public agencies, including sale, initial leasing, leasing or retention by the local government itself, at its fair market value for uses in accordance with the metropolitan redevelopment plan for the area;*

- ☑ **L.** *The local government is empowered in a metropolitan redevelopment area to undertake redevelopment that includes:*

  - ☑ *(1) demolition and removal of buildings and improvements;*

  - ☑ *(2) making the real property available for development or redevelopment by private enterprise or public agencies, including sale, leasing or retention by the local government itself, at its fair value for uses in accordance with the metropolitan redevelopment area plan; and*

- ☑ **M.** *Engage in rehabilitation or conservation that includes the restoration and renewal of a blighted area or portion thereof in accordance with any approved plan, by:*

  - ☑ *(1) carrying out plans for a program of voluntary or compulsory repair and rehabilitation of buildings or other improvements;*

- ☑ *(2) demolition or removal of buildings and improvements thereon where necessary to eliminate unhealthful, unsanitary or unsafe conditions, lessen or increase density, eliminate obsolete or other uses detrimental to the public welfare or to otherwise remove or prevent the spread of blight or deterioration or to provide land for needed public facilities;*

- ☑ *(3)* ***make recommendations*** *for the disposition of any property acquired in the area, including sale, leasing or retention by the local government itself, for uses in accordance with an approved plan*

- ☑ *(4) repair or rehabilitation of structures within the area;*

- ☑ *(5) power to resell repaired or rehabilitated property;*

- ☑ *(6)* ***after approval by the City of Santa Fe and after it has been determined that the expenditure is in accordance with the metropolitan redevelopment plan for that area, the Commission may authorize*** *the use of the proceeds of bonds issued pursuant to the Metropolitan Redevelopment Code for the purpose of constructing, repairing, remodeling or modifying a building or buildings located in the metropolitan redevelopment area. Such rehabilitation or conservation with use of funds expended by authority of the Metropolitan Redevelopment Code or by metropolitan revenue bonds authorized by that code shall be authorized.*

APPENDIX ITEM B: SANTA FE MIDTOWN MARKET STUDY

MIDTOWN MARKET ANALYSIS

Santa Fe Metropolitan Redevelopment Agency

Briefing Book | September 8, 2025

SBFRIEDMAN

VISION
ECONOMICS
STRATEGY
FINANCE
IMPLEMENTATION

TABLE OF CONTENTS

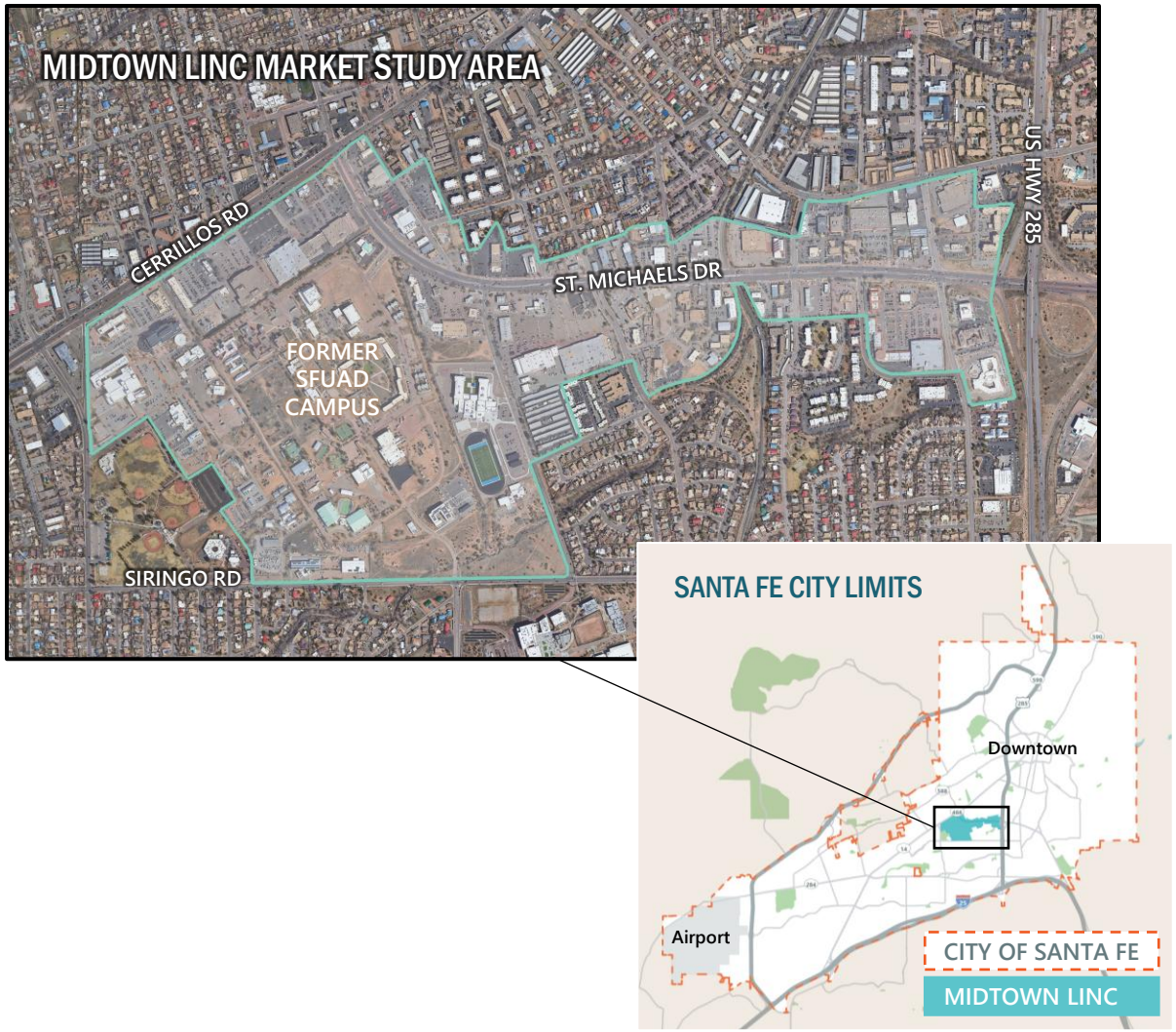
INTRODUCTION	3
MIDTOWN AREA ANALYSIS	8
INDUSTRY & DEMOGRAPHIC TRENDS	17
SANTA FE REAL ESTATE SUPPLY	26
MARKET ANALYSIS CONCLUSIONS	40

INTRODUCTION

STUDY PURPOSE

Midtown Local Innovation Corridor – Market Analysis

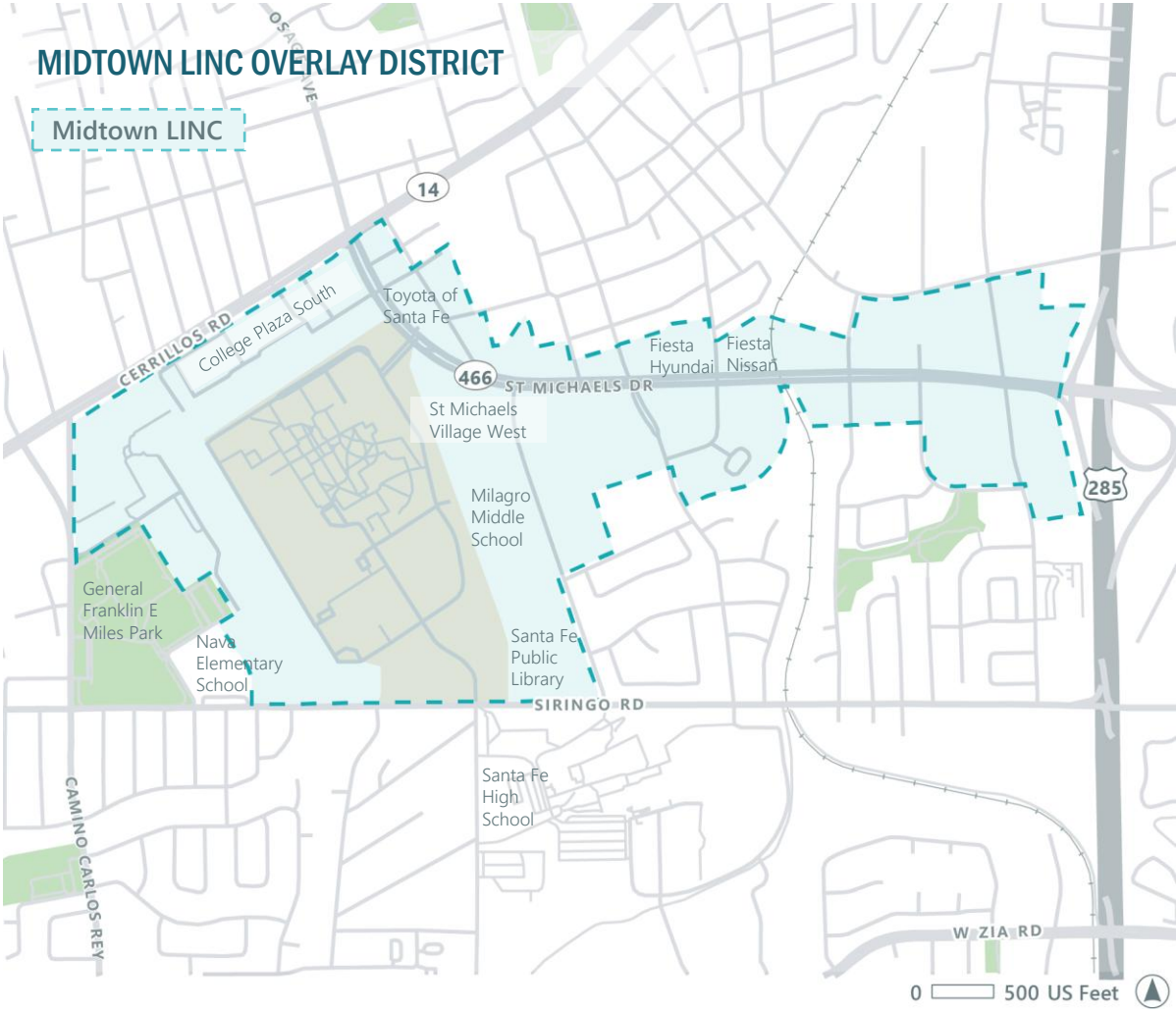
- The Santa Fe Metropolitan Redevelopment Agency engaged SB Friedman Development Advisors, LLC (SB Friedman) to conduct a market study for the area encompassed by the Midtown Local Innovation Corridor (LINC) Overlay District in concurrence with a Metropolitan Redevelopment Area designation for a similar area.
- The Midtown LINC encompasses ±378 acres of land near the intersection of Cerrillos Road and St. Michaels Drive in the geographic center of Santa Fe. The area includes the campus of the former Santa Fe University of Art and Design (SFUAD), which permanently closed in 2018.
- The 64-acre campus site was the focus of the recent community-driven Midtown master planning process following extensive public engagement. In November 2022, the City of Santa Fe approved the Midtown Master Plan. The long-term vision for the site prioritizes sustainability, economic vitality, and the creation of a mixed-use urban center.
- As part of this study, SB Friedman assessed industry and demographic trends in Santa Fe; analyzed the recent performance of multifamily, office, hotel, and retail in the Midtown LINC and the surrounding city; and estimated the pace of buildout for redevelopment sites within the study area.



MIDTOWN AREA – NEIGHBORHOOD CONTEXT

The Midtown LINC is primarily an auto-oriented area along major transportation corridors

- The Midtown LINC is bounded by Cerrillos Road to the northwest, Camino Carlos Rey to the east, Siringo Road to the south, and encompasses properties on either side of St. Michaels Road between Cerillos Road and U.S. 285.
- The LINC includes several shopping centers, big-box retailers, public sector uses including government offices, a middle school and the Santa Fe Public Library, some offices and the former campus of SFUAD.
- Cerrillos Road is a major transportation corridor in Santa Fe and is a nine-lane multi-modal roadway with a 40-mph speed limit. In addition to the six through lanes, Cerrillos Road has on-street unprotected bike lanes, a raised median and dedicated left- and right-turn lanes with access to surrounding businesses. Cerrillos Road is one of Santa Fe's most heavily trafficked roadways with 2024 annual average daily traffic counts of over 45,900 within the sections of the LINC. The heavy traffic, large building footprints and parking lots lining Cerrillos Road contribute to the auto-oriented nature of the corridor.
- St. Michaels Drive is another heavily trafficked corridor in Santa Fe. St. Michaels Drive is a seven-lane multimodal roadway with a 40-mph speed limit. In addition to six through lanes, St. Michaels Drive has a raised median and a left-turn lane. St. Michaels Drive had 2024 annual average daily traffic counts of over 24,700 within sections of the LINC.



MIDTOWN MASTER PLAN VISION

Midtown site is envisioned as a vibrant, walkable, mixed-use community at the center of the city

- The Midtown Master Plan focuses on the 64-acre, former SFUAD campus. After a four-year planning effort, which included extensive community engagement, the Midtown Master Plan and accompanying Midtown Community Development Plan were approved by the City of Santa Fe in 2022 and 2023, respectively. These documents lay out the community's vision for the site as well as the policies guiding future redevelopment.
- The Midtown Master Plan envisions the site as a vibrant, walkable, mixed-use community for Santa Feans at the center of the city, with a mix of new construction and adaptive reuse of existing structures.
- To execute the vision, the Midtown Master Plan includes sub-zone standards and façade-zone standards. Sub-zone standards designate preferred uses for each development site. Midtown site sub-zones include civic-space, mixed-use neighborhood, mixed-use center, mixed-use office, mixed-use film and community-oriented use. Façade-zone standards control physical elements including setbacks, height step backs and required frontage types. Midtown site façade zones include plaza, main street, main street-office, live/work, neighborhood residential and neighborhood paseo.

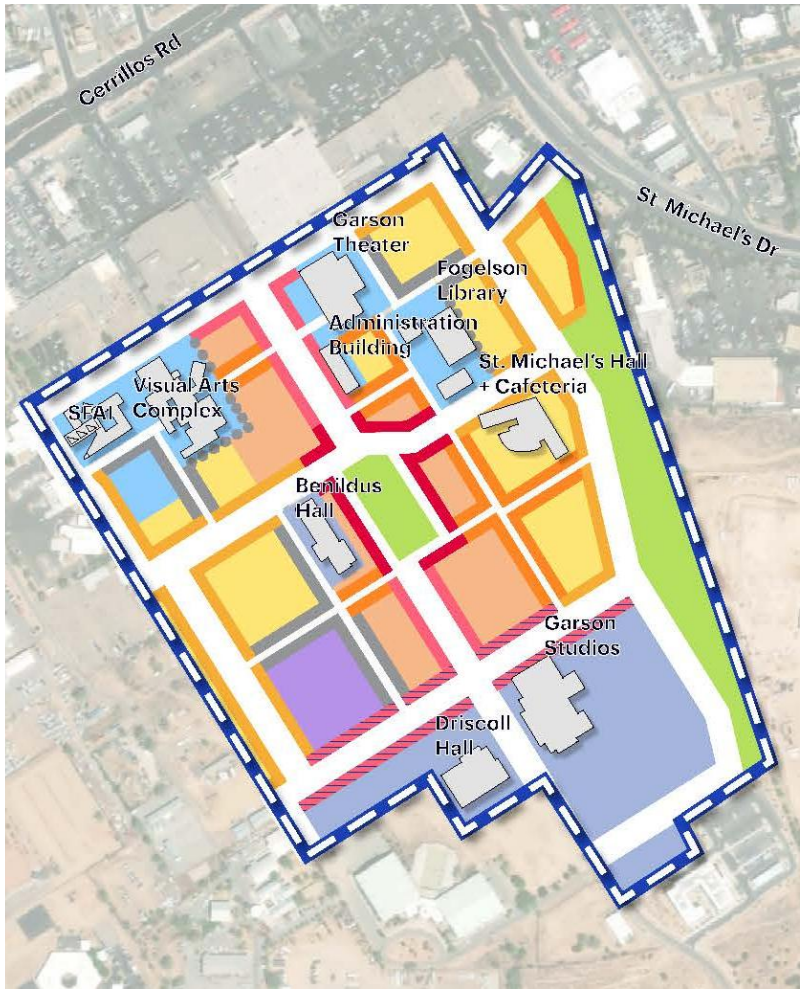
The Midtown Site

Sub-Zones:

- Civic Space (CS)
- Mixed-Use Neighborhood (MU–N)
- Mixed-Use Center (MU–C)
- Mixed-Use Office (MU–O)
- Mixed-Use Film (MU–F)
- Community-Oriented Use (CO)
- Existing Buildings to Reuse

Facade Zones:

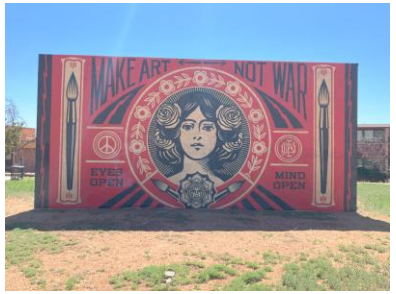
- Plaza (PL)
- Main Street (MS)
- Main Street–Office (MS–O)
- Live/Work (LW)
- Neighborhood Residential (NR)
- Neighborhood Paseo (NP)
- 3 stories max. height within 30' of indicated parcel line



Source: City of Santa Fe Metropolitan Redevelopment Agency, SB Friedman

MIDTOWN AREA – EXISTING CONDITIONS

A market-responsive strategy can help achieve the Midtown Master Plan vision



- The Midtown LINC is negatively impacted by physical and economic issues: lacking or unsafe infrastructure, large vacant properties, underutilized land, and recent disinvestment.
- This study builds off the 2022 Midtown Master Plan and analyzes the market conditions for the various land uses proposed in the plan.

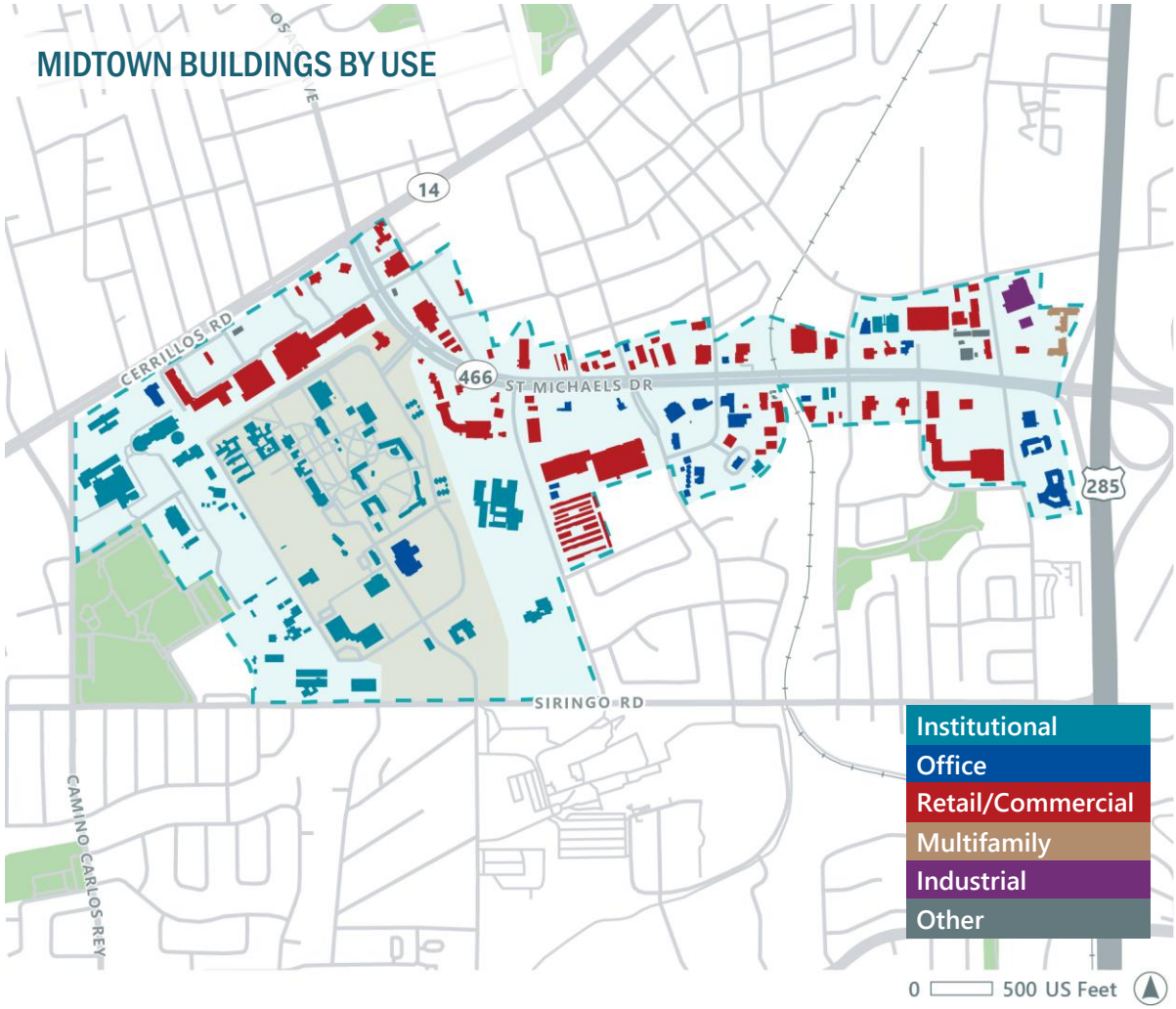
Source: SB Friedman

MIDTOWN AREA ANALYSIS

MIDTOWN AREA LINC BUILDING USES

Commercial and institutional uses account for the bulk of the building area in the Midtown LINC

- Commercial and retail buildings account for a plurality of the building area within the Midtown LINC. Commercial properties are primarily located along Cerillos Road and St. Michaels Drive, the two major thoroughfares in the study area.
- The Midtown LINC also contains many institutional buildings, most of which are located on the former SFUAD campus site and surrounding properties. Some of the former campus buildings will be reused, though others will be demolished to accommodate redevelopment.
- There are office buildings located throughout the Midtown LINC, though most are concentrated on the eastern half of the study area, along St. Michaels Drive.
- There is also one multifamily property and two industrial buildings within the Midtown LINC, all on the eastern edge of the study area.



MIDTOWN LINC EXISTING REAL ESTATE SUPPLY

Existing Midtown real estate supply is primarily commercial and institutional with some office space

- The Midtown LINC primarily contains commercial and institutional land uses. The Midtown LINC contains approximately 1.1M SF of commercial space. Midtown's commercial square footage makes up 15.6% of Santa Fe's total commercial inventory.
- Over 348,100 SF of commercial space was built in Santa Fe since 2015, with the Midtown LINC capturing 52,057 SF. Therefore, the Midtown LINC's capture of new commercial development (15.0%) is roughly equal to its total share of Santa Fe commercial space (15.6%).
- The Midtown LINC is not a core office market. The Midtown LINC currently contains 332,421 of office space, or 4.6% of the total office space in Santa Fe. Approximately 115,600 SF of office space has been built across the city since 2015. Meanwhile, the last office project delivered in the Midtown LINC was completed in 2003.
- There is one rent-restricted affordable multifamily project within the Midtown LINC. This project has 136 units, which accounts for 1.6% of the entire city's multifamily inventory. The Midtown LINC does not contain other residential uses but is surrounded by residential neighborhoods like Hopewell-Mann.

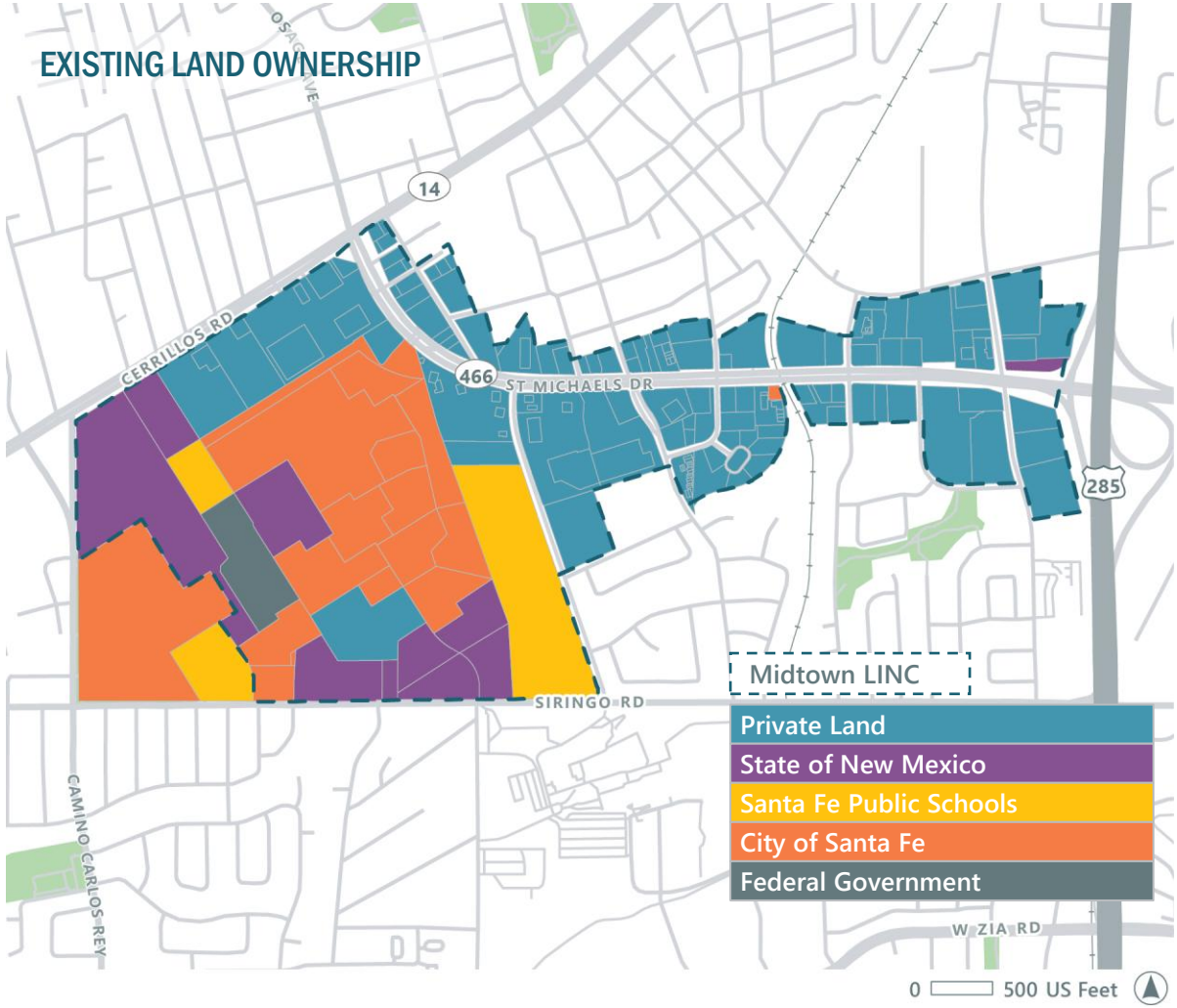
	Santa Fe	Midtown LINC	Area Capture
Total Multifamily Units	8,425	136[1]	1.6%
Built Since 2015	*2,389*	*0*	*0%*
Stabilized Vacancy	7.2%	N/A	--
Average Rent/SF	$2.00	N/A	--
Total Commercial SF	7,268,856	1,131,333	15.6%
Built Since 2015	*348,158*	*52,057*	*15.0%*
Vacancy	2.3%	1.6%	--
Average Rent/SF	$18.45	$15.90	--
Total Office SF	7,160,595	332,421	4.6%
Built Since 2015	*115,567*	*0*	*0%*
Vacancy	1.6%	N/A	--
Average Rent/SF	$23.68	N/A	--

[1]A single rent-restricted affordable multifamily project accounts for all Midtown units..
Source: CoStar, SB Friedman

EXISTING LAND OWNERSHIP

Public entities control most of the land associated with the former SFUAD campus

- Land within the Midtown LINC land is owned by private owners as well as various public entities including the State of New Mexico, Santa Fe Public Schools, the City of Santa Fe and the federal government.
- The land associated with the former SFUAD campus is mostly held publicly, giving the public sector significant control over how this land is redeveloped.

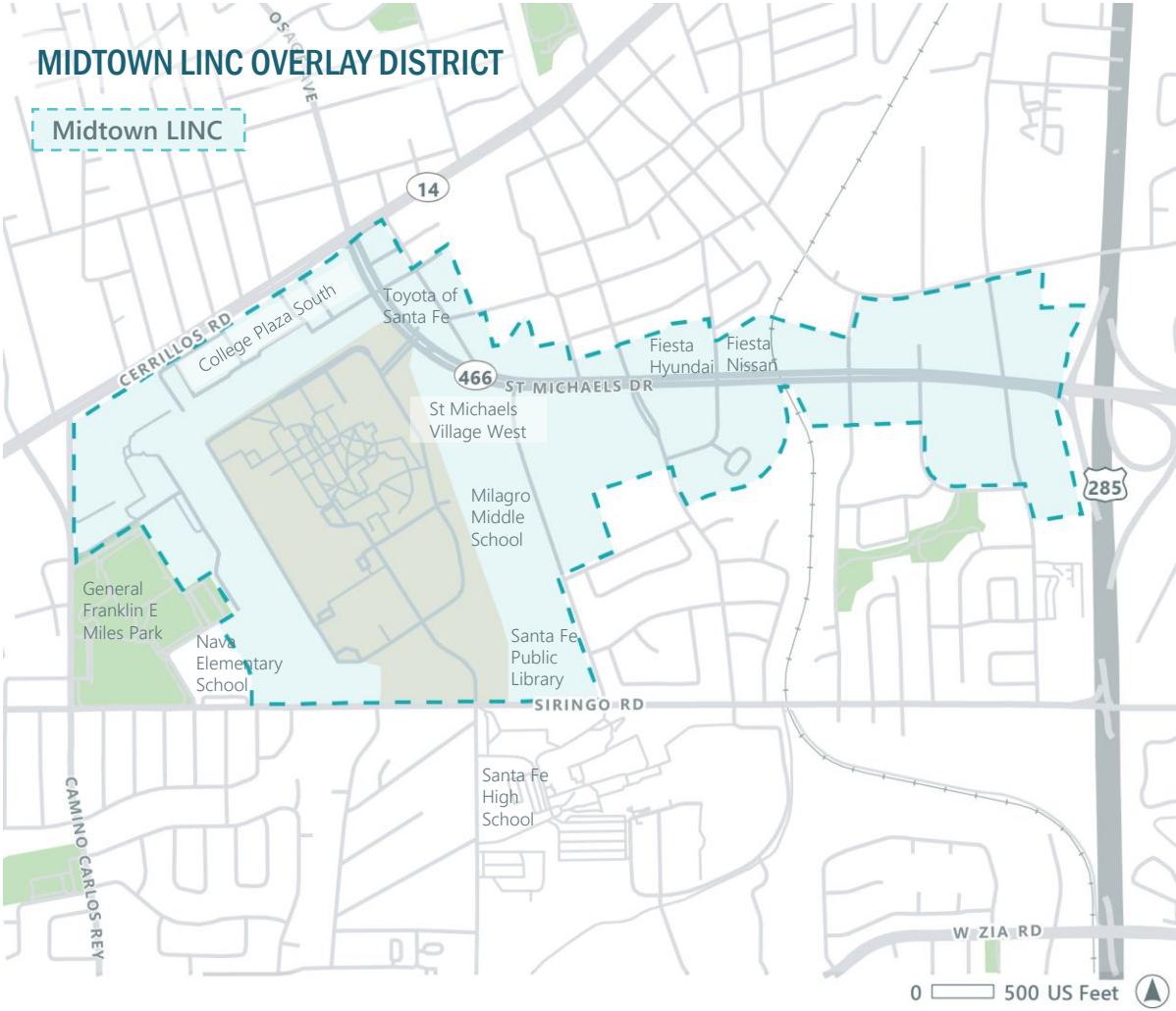


Source: City of Santa Fe, SB Friedman

MIDTOWN LINC OVERLAY DISTRICT

The overlay prioritizes denser, mixed-use buildings, but such development has not occurred in the area

- The Midtown Local Innovation Corridor (LINC) Overlay District is a zoning overlay adopted by the City of Santa Fe in 2016. The purpose of the Midtown LINC is to strengthen the built environment, support redevelopment, and enhance connectivity within Santa Fe's geographic and demographic center.
- The overlay established design standards that prioritize four-story mixed-use buildings, street facing architecture and enhanced landscaping to foster a more cohesive urban fabric. The overlay also prohibits certain uses that are not aligned with the district vision.
- Residential projects and certain non-residential uses that meet development standards pay reduced development budget water fees and are exempt from various impact and review fees. Additionally, qualifying projects go through a more streamlined, administrative plan review process.
- However, despite these changes, the qualifying projects that the overlay intended to facilitate have not yet been developed, though one such project—the Arthouse—is currently under construction. Real estate market interviews indicated that strict design standards, insufficient incentives, and unwilling property owners have limited new, residential development within the LINC.

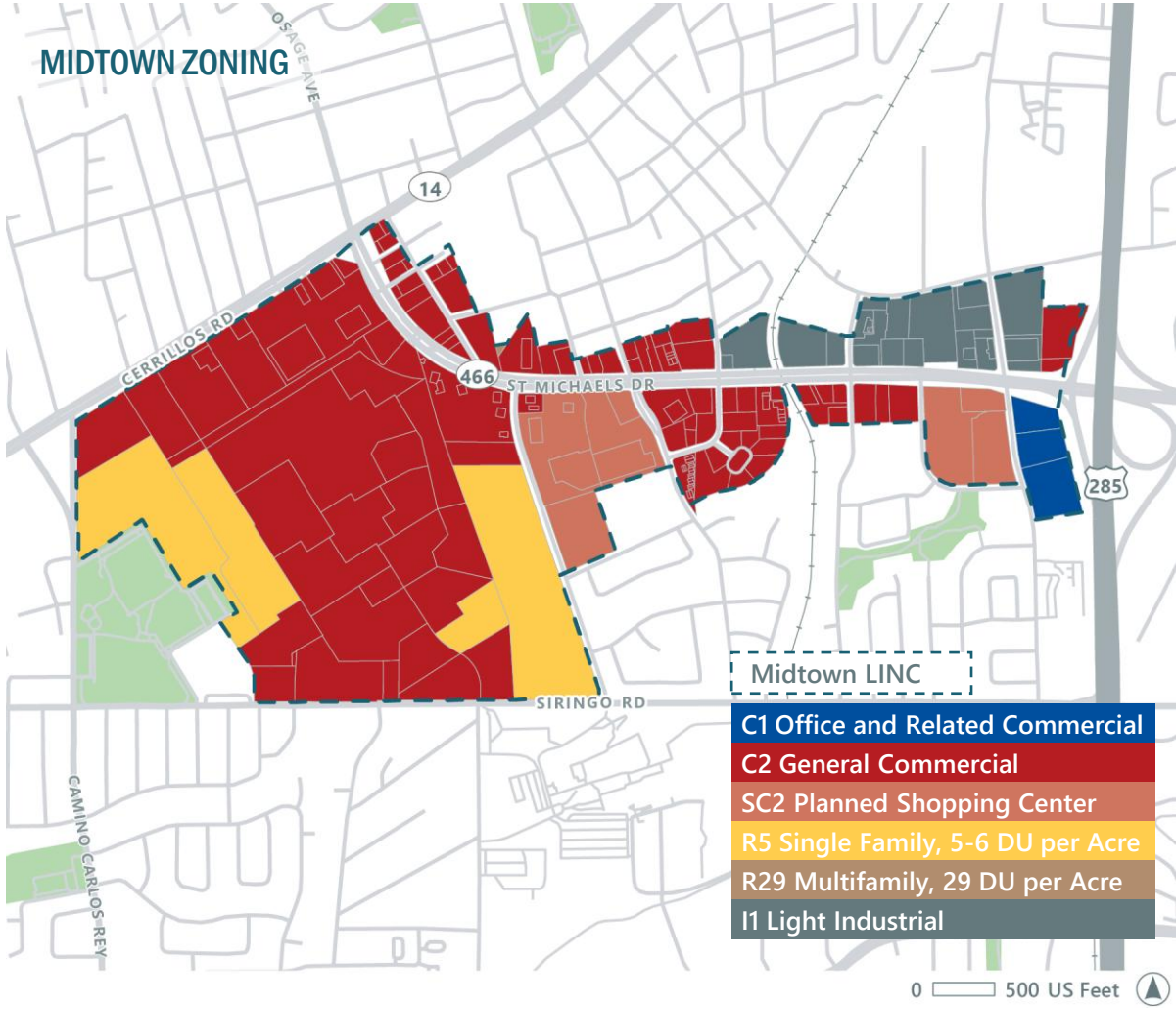


Source: City of Santa Fe, Pland Collaborative, SB Friedman

ZONING

Midtown is primarily zoned for commercial uses with some residential, light industrial and office

- Most of the base zoning in the Midtown LINC is for general commercial uses. Other uses include light industrial, planned shopping centers, single family residential, and office and related commercial uses.
- The Midtown LINC overlay allows for residential uses throughout the area, regardless of base zoning, while prohibiting certain uses that are not aligned with the district vision. The design overlay also sets design standards that prioritize four-story mixed-use buildings, street-facing architecture and enhanced landscaping to foster a more cohesive urban fabric.

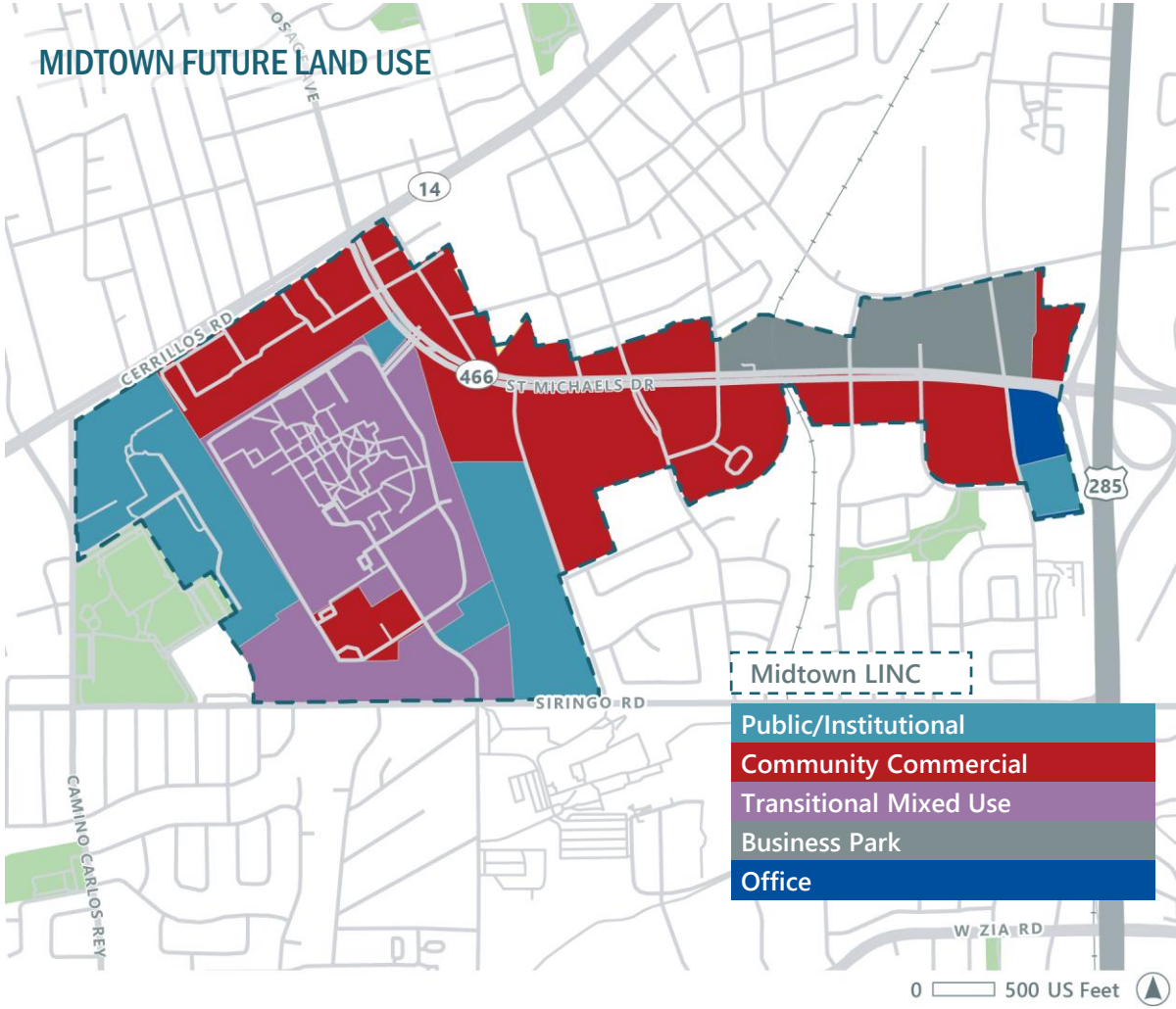


Source: City of Santa Fe, SB Friedman

FUTURE LAND USE

Future land use of Midtown generally reflects current zoning with some adjustments

- The future land use of the Midtown LINC includes public/institutional, community commercial, transitional mixed use, business park and office uses.
- Much of the land that is currently zoned for single family residential will be public/institutional in the future, which is in line with the current public sector ownership of the site.
- Some of the land currently zoned for general commercial uses is designated to be transitional mixed use in the future. This transitional mixed use portion of the site includes the core Midtown site.
- The land along Cerrillos Road and St. Michaels Drive is anticipated to remain designated for commercial uses.

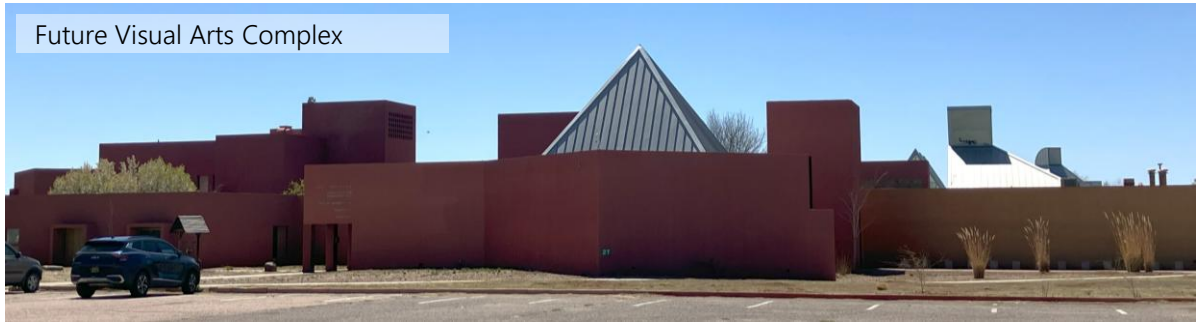


Source: City of Santa Fe, SB Friedman

MIDTOWN CAMPUS ANCHORS

Existing and planned anchors will generate activity and help make Midtown a destination

Plans for the Midtown campus include several anchors that will generate activity on the site and help contribute to a sense of place. Some of these uses are currently operating while others will reactivate or redevelop existing structures on the former SFUAD campus.


Future Visual Arts Complex

Future Fogelson Library

Garson Studios

CURRENTLY OPERATING USES

Garson Studios: Existing studio facilities were redeveloped and now include 24,100 SF of soundstages and over 27,000 SF of office and production support space.

Santa Fe Art Institute: SFAI currently operates a 17,000 SF facility that includes art studios, a gallery, a library, and artist living accommodations.

PLANNED USES

Visual Arts Complex: Existing SFUAD facilities will be redeveloped into a creative cultural hub that will provide accessible arts, design and cultural programming and education to the community.

Greer Garson Theatre Center: Currently not operational, the facility includes a 500-seat theater, a 100-seat black box theater, classrooms and additional amenities. After renovations, the facility will be reactivated as a performing arts venue with additional community-oriented uses.

Fogelson Library: The former SFUAD library will be converted to a branch of the Santa Fe Public Library complete with a community learning and innovation center.

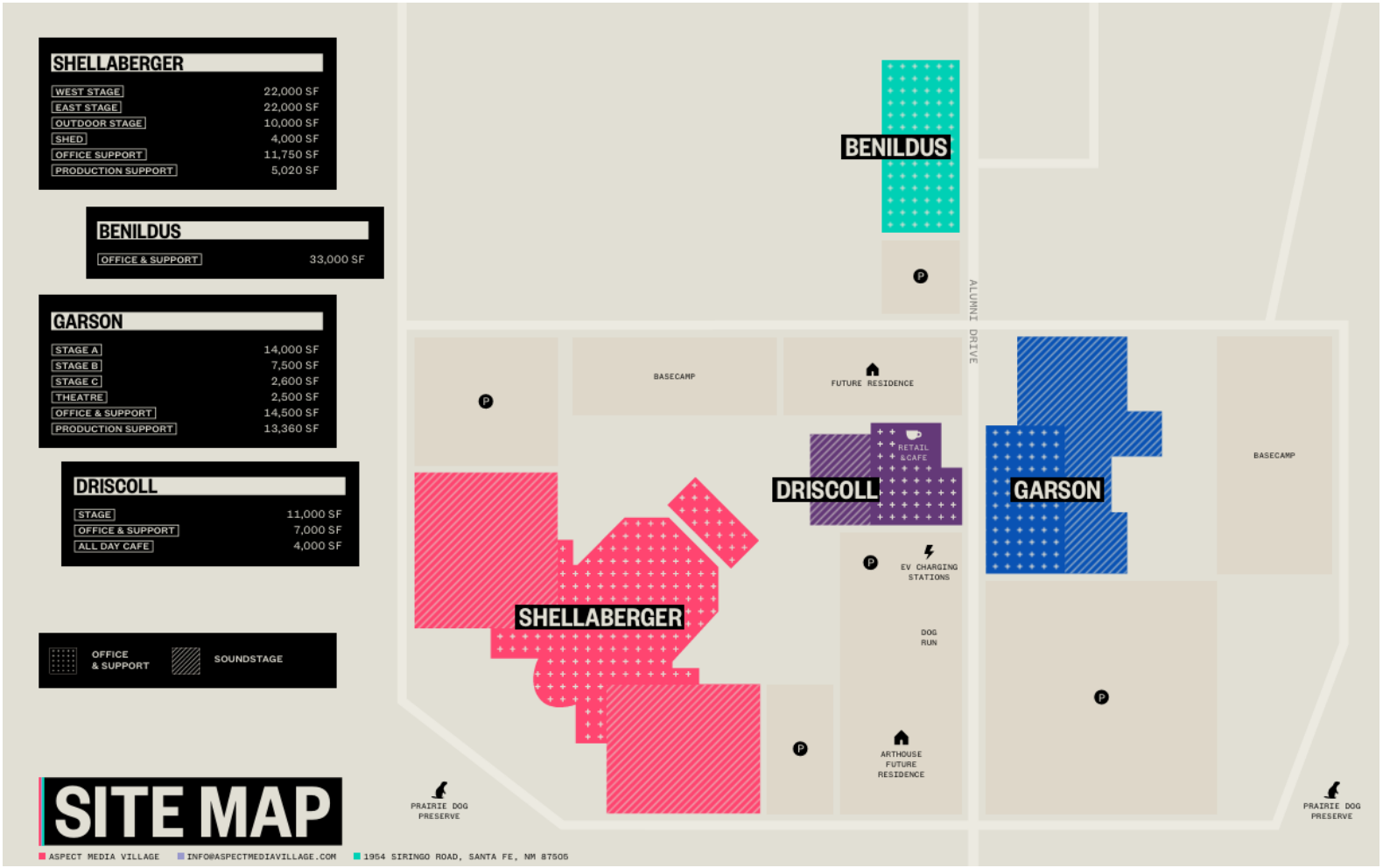
Aspect Media Village Movie Theater: An existing theater space in Garson Studios will be opened as a 2,500 SF commercial movie theater.

Aspect Media Village Restaurant and Bar: Part of the existing Driscoll Hall building will be developed into a 4,000 SF restaurant space.

ASPECT MEDIA VILLAGE

Aspect Media Village is the largest film and tv production studio in northern New Mexico

- Aspect Media Village encompasses approximately 23 acres within the Midtown LINC and is located on the southern end of the former SFUAD campus.
- Aspect Media Village is the largest film and tv production studio in northern New Mexico. It includes six soundstages totaling over 75,000 square feet, as well as 90,000 square feet of office and support space.
- In addition to the studio space, there are several planned development and redevelopment projects planned for Aspect Media Village, including the 129-unit Arthouse multifamily development, another future multifamily development, a movie theater and restaurant.



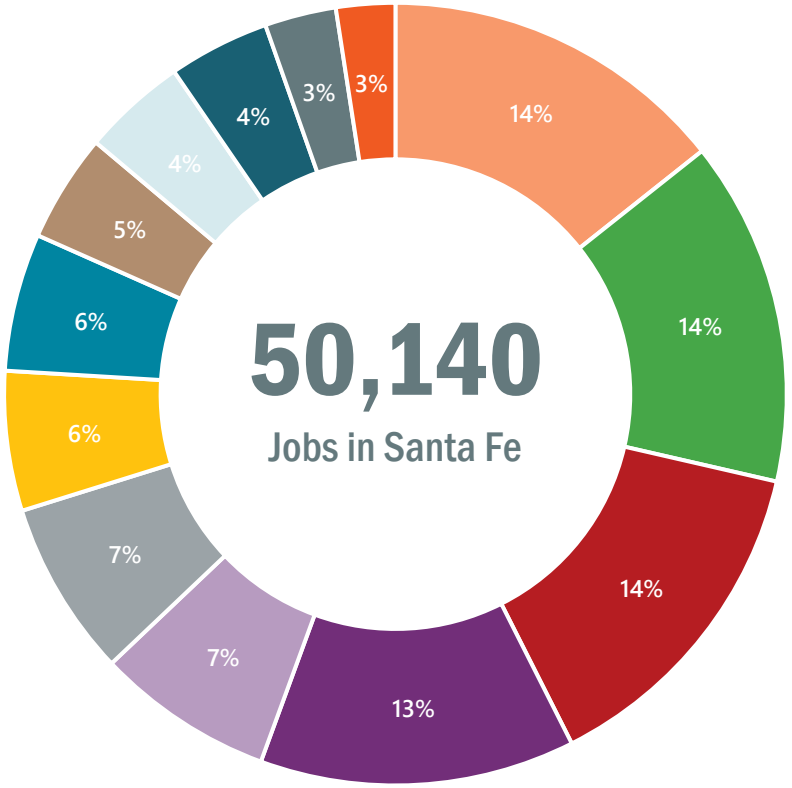
Source: Aspect Media Village

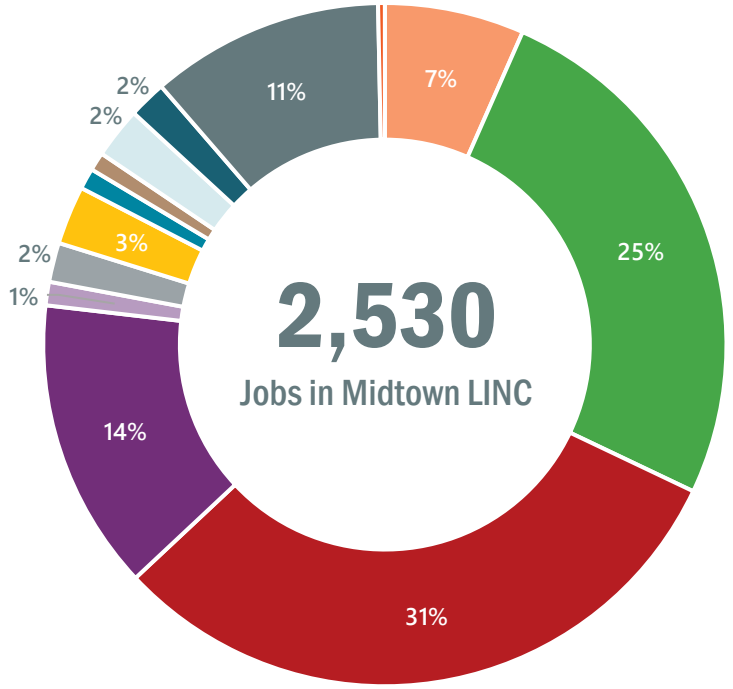
INDUSTRY & DEMOGRAPHIC TRENDS

SANTA FE EMPLOYMENT BASE

Over half of Midtown LINC jobs are in public administration or retail trade

There are approximately 50,140 jobs in Santa Fe and 2,530 jobs in the Midtown LINC. Health Care and Social Assistance, Public Administration and Retail Trade are the top sectors in Santa Fe, each making up 14% of jobs. Meanwhile, Retail Trade and Public Administration are the top sectors in the Midtown LINC, making up 31% and 25% of Midtown LINC jobs, respectively. While 56% of jobs in the Midtown LINC are within these two sectors, they make up only 28% of jobs in the whole city. The Midtown LINC also has a larger share of jobs in accommodation and food services and finance and insurance than the city.





5%

OF SANTA FE JOBS ARE IN MIDTOWN

- Health Care and Social Assistance
- Public Administration
- Retail Trade
- Accommodation and Food Services
- Admin & Support, Waste Mgmt & Remediation
- Other
- Professional, Scientific & Technical Services
- Educational Services
- Construction
- Other Services (Excluding Public Admin)
- Information
- Finance and Insurance
- Arts, Entertainment & Recreation

Source: US Census Longitudinal Employment Household Dynamics (LEHD), 2022

SANTA FE COUNTY AND CITY TARGET INDUSTRIES

The City and Santa Fe County target similar industries, including creative and film industries

Santa Fe County and the City of Santa Fe hope to attract similar clusters, particularly in the outdoor recreation, creative, and film industries. As part of Santa Fe County Economic Development Division's goal to "promote a sustainable and equitable community," the County aims to incentivize sustainable economic development through strategies including enhancing four target industry clusters. The City of Santa Fe Office of Economic Development similarly focuses on strengthening target industry cluster development.

SANTA FE COUNTY

- OUTDOOR RECREATION
- CREATIVE INDUSTRIES
- FILM INDUSTRIES
- AGRICULTURE

CITY OF SANTA FE

- OUTDOOR RECREATION
- CREATIVE/EXPERIENCE
- THE ARTS
- FILM INDUSTRIES
- FOOD SECTOR
- TECH & ADVANCED MANUFACTURING
- HEALTHCARE
- TOURISM & HOSPITALITY

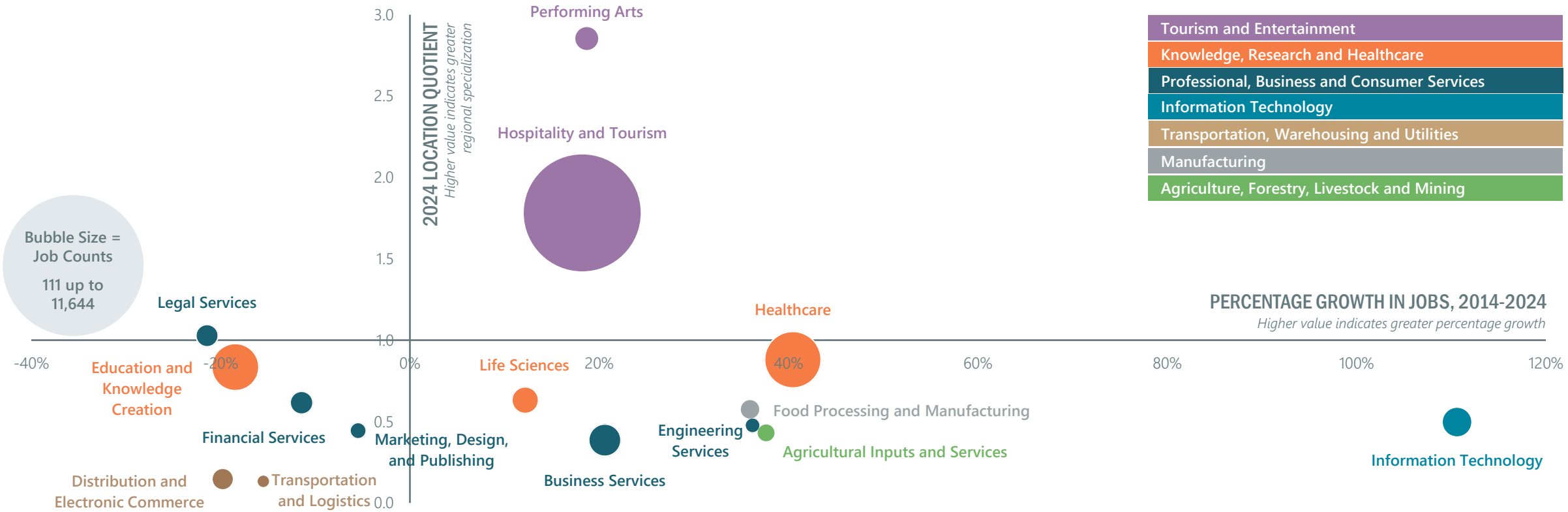
OUTDOOR RECREATION
CREATIVE
FILM
OTHER

Source: City of Santa Fe Office of Economic Development, Santa Fe County Economic Development Division, SB Friedman

SANTA FE COUNTY MAJOR ECONOMIC CLUSTERS

Information Technology was the fastest growing sector in Santa Fe County over the last decade

Santa Fe County has experienced growth across many economic clusters since 2014. The Information Technology cluster grew by over 110% (+360 jobs) from 2014 to 2024, making it the fastest growing sector in the county. Despite its significant growth, it only provides 691 jobs, making it the fifth largest sector in the county. The two largest sectors, Hospitality and Tourism and Healthcare, which provide over 11,500 and 2,700 jobs, respectively, had more moderate growth rates of 18% (+1,790 jobs) and 40% (+800 jobs).



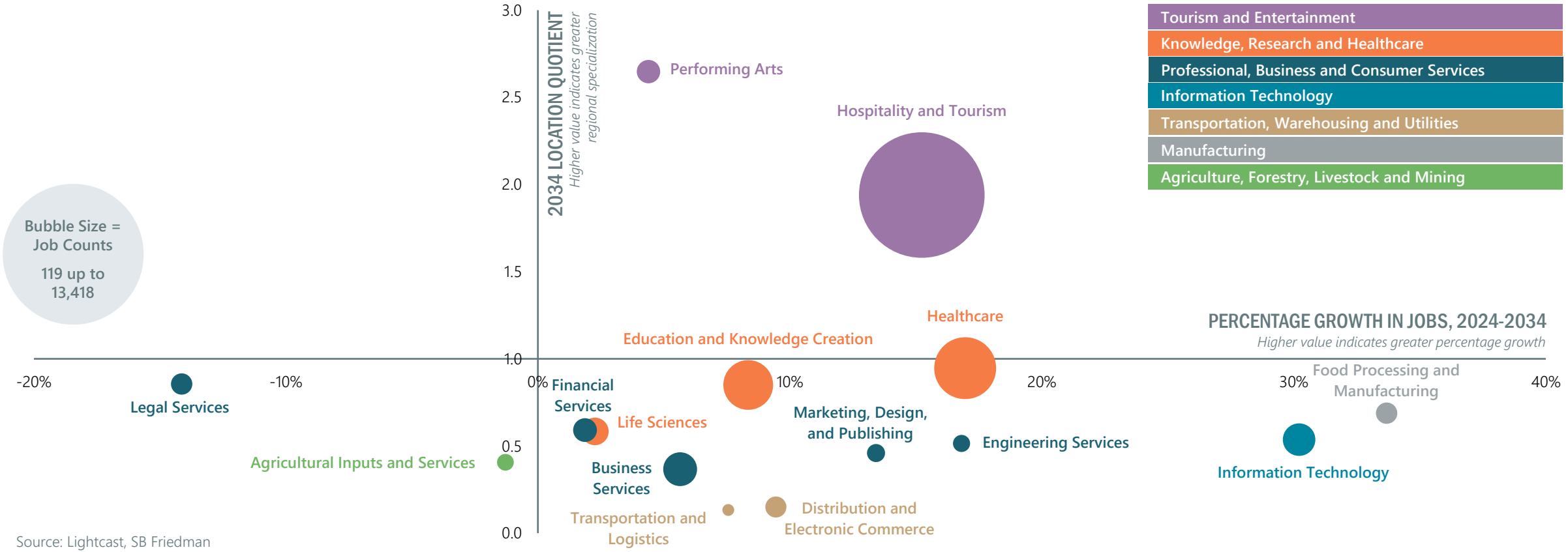
Source: Lightcast, SB Friedman

SB Friedman Development Advisors, LLC

SANTA FE COUNTY PROJECTED ECONOMIC CLUSTER GROWTH

Job growth is projected to be driven largely by Hospitality and Tourism

Hospitality and Tourism is projected to remain the largest employment cluster, adding over 1,770 jobs to the county from 2024 to 2034. Hospitality and Tourism's growth will account for 47% of projected new jobs during the period. Healthcare is projected to remain the second-largest economic cluster, adding over 470 jobs to the county and accounting for 13% of new jobs during the period. While Food Processing and Manufacturing and Information Technology are projected to be the fastest growing clusters, their growth will only account for a combined 9% of new jobs.



Source: Lightcast, SB Friedman

SB Friedman Development Advisors, LLC

HISTORIC & PROJECTED MAJOR ECONOMIC CLUSTER GROWTH

Most clusters are projected to grow after experiencing job losses from 2014 to 2024

Hospitality and Tourism has remained the largest employment cluster in Santa Fe County since 2014. Hospitality and Tourism provides over four times as many jobs as the second-largest cluster. Although Hospitality and Tourism is the largest sector, it has the lowest average wage of the ten largest employment sectors. The second-largest cluster has shifted from Education in Knowledge Creation in 2014 to Healthcare in 2024. Healthcare is projected to remain the second-largest cluster while Education and Knowledge Creation remains the third-largest after experiencing negative growth from 2014 to 2024.

	Employment, 2014	Employment, 2024	Employment, 2034	Employment CAGR, 2014-2024	Employment CAGR, 2024-2034	Weighted Average Wage, 2024
Hospitality and Tourism	9,851	11,644	13,418	1.7%	1.4%	$41,700
Healthcare	1,982	2,783	3,255	3.5%	1.6%	$103,300
Education and Knowledge Creation	2,382	1,943	2,105	-2.0%	0.8%	$54,100
Business Services	763	920	972	1.9%	0.6%	$108,600
Information Technology	328	691	900	7.7%	2.7%	$150,900
Life Sciences	564	632	647	1.2%	0.2%	$110,300
Financial Services	531	470	479	-1.2%	0.2%	$285,000
Legal Services	573	450	387	-2.4%	-1.5%	$131,400
Performing Arts	376	446	466	1.7%	0.4%	$96,700
Distribution and Electronic Commerce	429	344	377	-2.2%	0.9%	$95,400

Source: Lightcast, SB Friedman

SANTA FE HOUSEHOLD AGE & INCOME

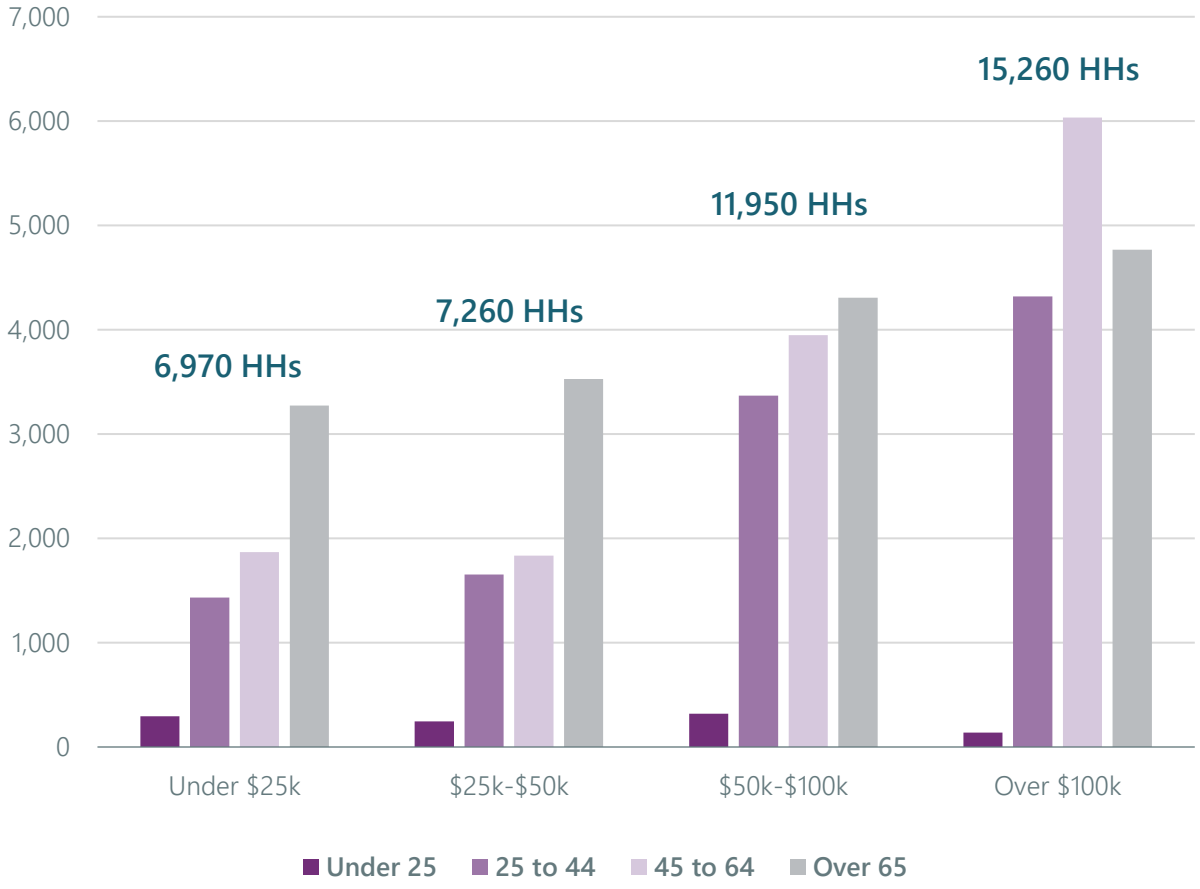
Santa Fe is projected to see an increase in households earning above $100k annually

$74,200
MEDIAN HOUSEHOLD INCOME

46
MEDIAN AGE

- As of 2024, Santa Fe has a population of 90,187 and has a total of 41,335 households. While median household income is $74,200, over 35% of Santa Fe households have incomes of over $100,000.
- Between 2024 and 2029, Santa Fe is projected to gain 1,300 net new households. Santa Fe is projected to lose approximately 900 households earning less than $25,000 and 750 households earning between $25,000 and $50,000 over this period.
- Santa Fe is projected to gain approximately 100 households earning between $50,000 and $100,000 and 2,900 households earning over $100,000 during this period.

SANTA FE HOUSEHOLDS BY AGE & INCOME, 2024

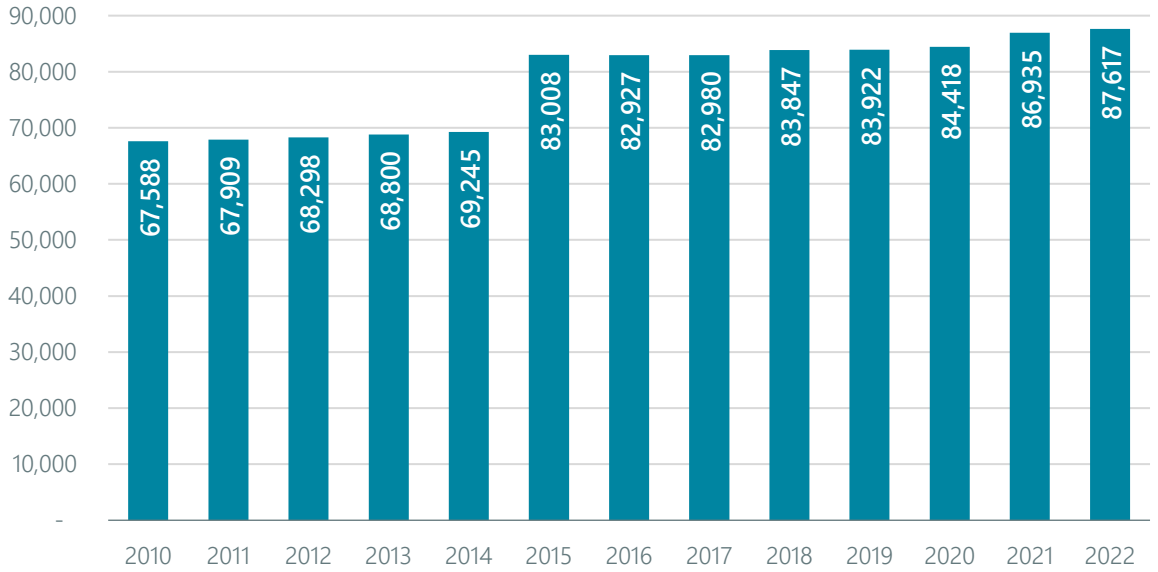


Source: Esri Business Analyst (2024), SB Friedman

SANTA FE POPULATION & JOB GROWTH

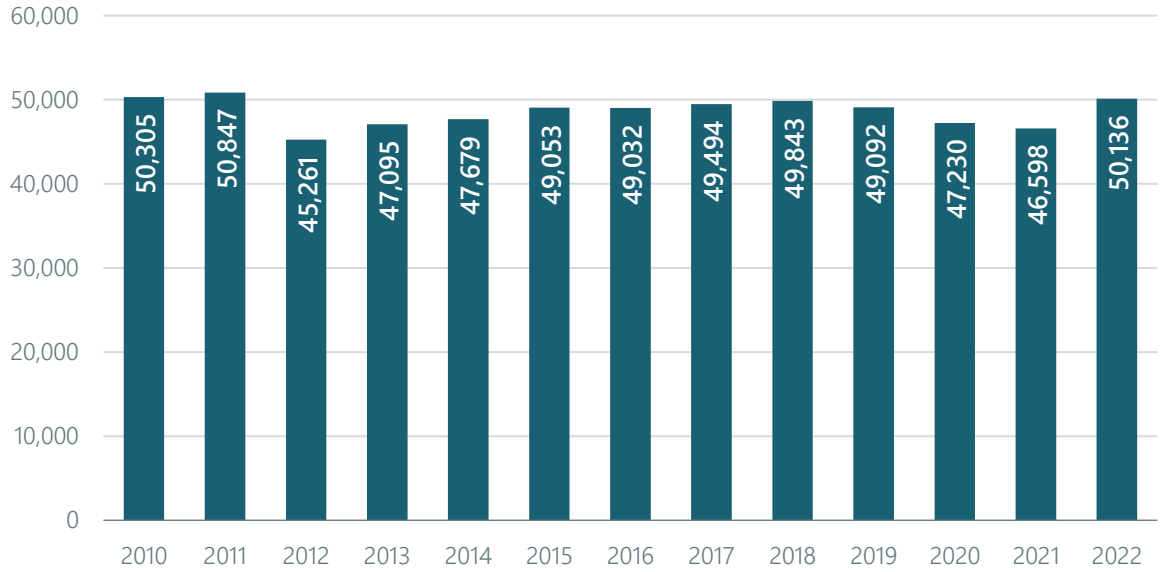
Total population has increased while total jobs have decreased

SANTA FE TOTAL POPULATION, 2010-2022[1]



- The total population of Santa Fe increased from 67,588 in 2010 to 87,617 in 2022. From 2014 to 2015, the population increased by 13,763, at least 13,200 of which was due to the annexation of 4,400 acres by the City of Santa Fe.
- From 2015 to 2022, the total population of Santa Fe grew at a compound annual growth rate of 0.8%.

SANTA FE TOTAL JOBS, 2010-2022



- The total number of jobs in Santa Fe decreased from 50,035 in 2010 to 50,136 in 2022. Santa Fe lost more than 5,000 jobs between 2010 and 2012. Since 2012, the total number of jobs has increased but has yet to recover to 2010 levels.

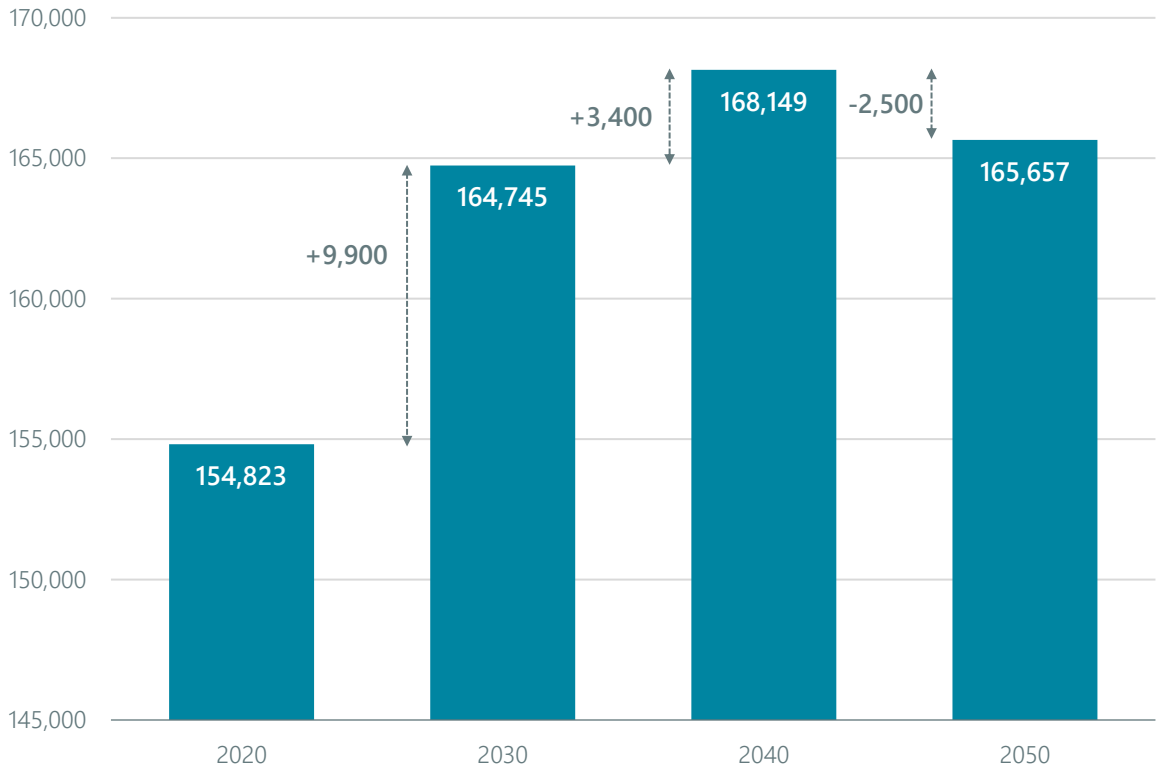
[1]Annexation of 4,400 acres to Santa Fe in 2014 added approximately 13,200 residents to Santa Fe.
Source: American Community Survey (ACS) 5-Year Estimates (2010-2023), US Census Longitudinal Employment Household Dynamics (LEHD) (2010-2022), SB Friedman

SANTA FE COUNTY PROJECTED POPULATION GROWTH

Santa Fe County projected to add over 13,300 net new residents between 2020 and 2040

- The Santa Fe County population is projected to increase by over 13,300 from 2020 to 2040. Approximately three-quarters of the population growth from 2020 to 2040 is projected to occur from 2020 to 2030. County population is projected to reach 164,745 by 2030 and 118,150 by 2040.
- After reaching 168,149 in 2040, Santa Fe County's population is projected to decrease by almost 2,500 by 2050. Although population is projected to decrease from 2040 to 2050, it is projected to remain higher than the 2030 population.

SANTA FE COUNTY POPULATION PROJECTIONS, 2020-2050



Source: University of New Mexico Population Projections (2010-2050), SB Friedman

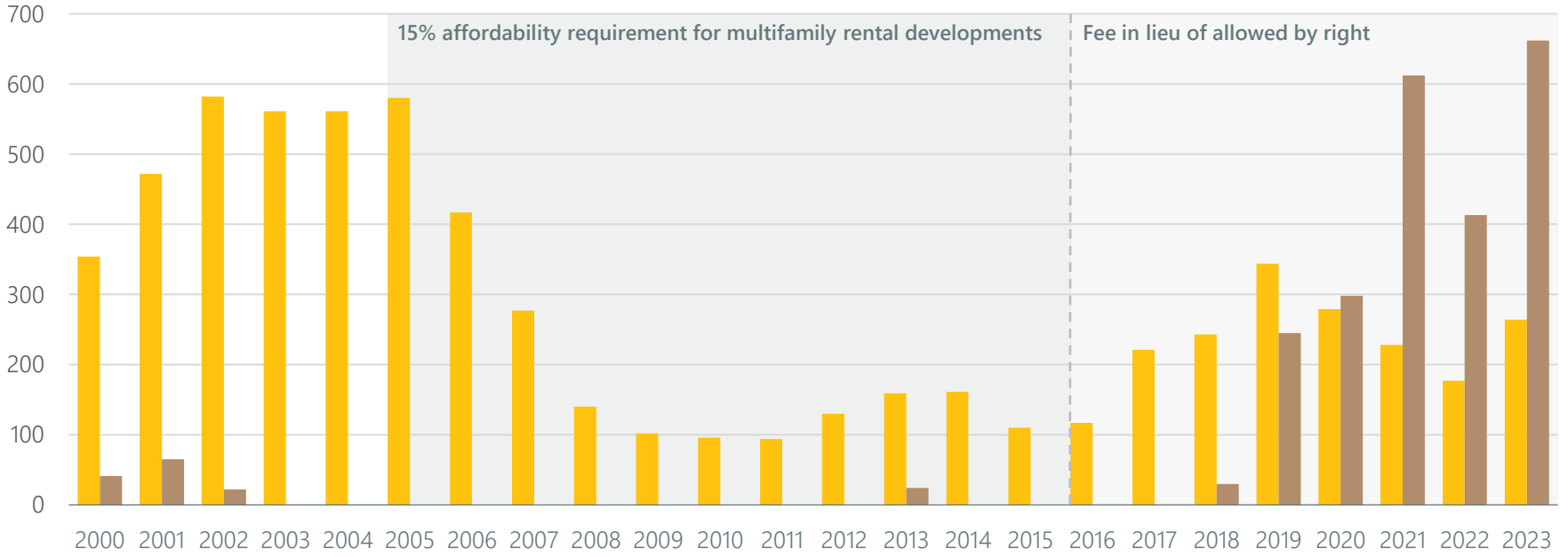
SANTA FE REAL ESTATE SUPPLY

SANTA FE RESIDENTIAL BUILDING PERMITS

Since 2018, the majority of the residential units permitted in Santa Fe have been multifamily homes

Since 2000, the majority (74%) of residential units permitted in Santa Fe have been single-family homes. In 2016, Santa Fe amended its affordability requirements to allow developers of multifamily projects to pay a fee in lieu of affordable units. This amendment was followed by an increase in multifamily development. Since 2019, an average of 446 units have been permitted in Santa Fe annually. In the year 2019 alone, 245 multifamily units were permitted – more than the combined total of multifamily units permitted in the prior 18 years. Every year since 2020, more multifamily units have been permitted than single-family units. In 2023 alone, over 660 multifamily units were permitted, marking the largest number of any type of units permitted in a single year since at least 2000.

SANTA FE RESIDENTIAL UNITS PERMITTED, 2000-2023



Single-Family
Multifamily

TOTAL UNITS PERMITTED

	Single-Family	Multifamily
2000-2005	3,110	128
2006-2011	1,126	0
2012-2017	898	24
2018-2023	1,535	2,260

Source: U.S. Census Bureau, Building Permits Survey, SB Friedman

SANTA FE MULTIFAMILY INVENTORY

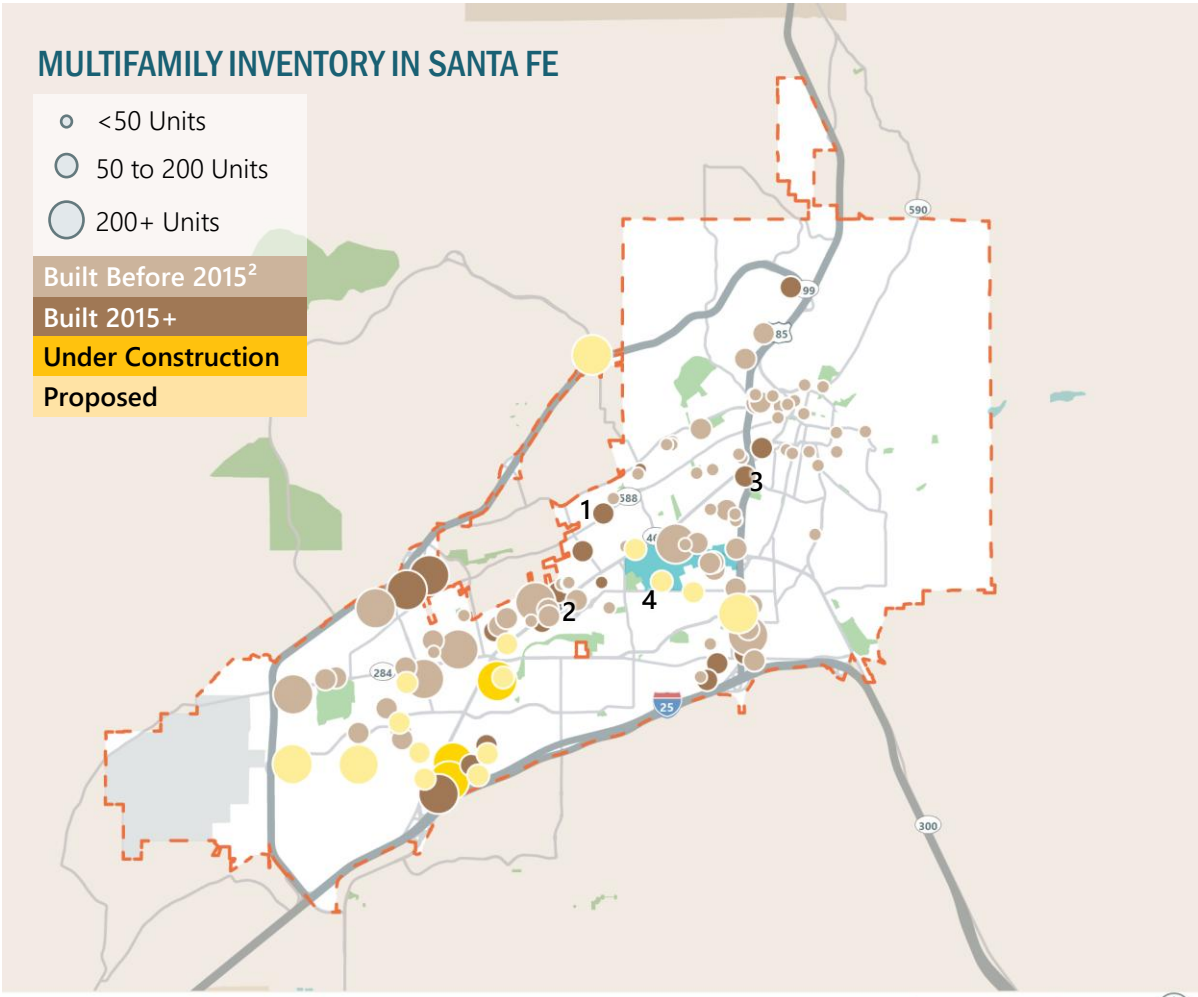
There are thousands of multifamily units under construction or proposed in Santa Fe

- Santa Fe has over 8,400 multifamily rental units (market-rate and affordable). Approximately 2,090 market-rate multifamily rental units have been built in Santa Fe since 2015. New development since 2015 comprises 36% of the existing multifamily inventory. Santa Fe has 1,090 units currently under construction and an additional 4,430 units proposed.
- Market interviews revealed that given the recent pace of development, some real estate professional believe the Santa Fe market-rate multifamily market may currently be overbuilt. The pace of new market-rate development may slow in the near-term, particularly with uncertainty about tariffs increasing construction costs.
- However, there continues to be an overall regional housing shortage – particularly for homes affordable to lower- and moderate-income households. Given broader regional housing needs, multifamily is expected to remain a strong real estate market segment over the medium- to long-term.

8,425
EXISTING MULTIFAMILY UNITS IN SANTA FE[1]

7.2%
STABILIZED MARKET-RATE VACANCY RATE

$2.22
MARKET-RATE AVERAGE RENT PER SF



Map includes market-rate and affordable residential rental units

[1]Multifamily unit inventory market-rate units, affordable units and assisted/independent living developments, but does not include short-term rentals or mobile home parks.
[2]Multifamily properties without year-built values in CoStar are assumed to be built before 2015 and symbolized as such.
Source: CoStar, SB Friedman

SAMPLE RECENT MULTIFAMILY PROJECTS

New multifamily development have average rents around ±$2.40/SF

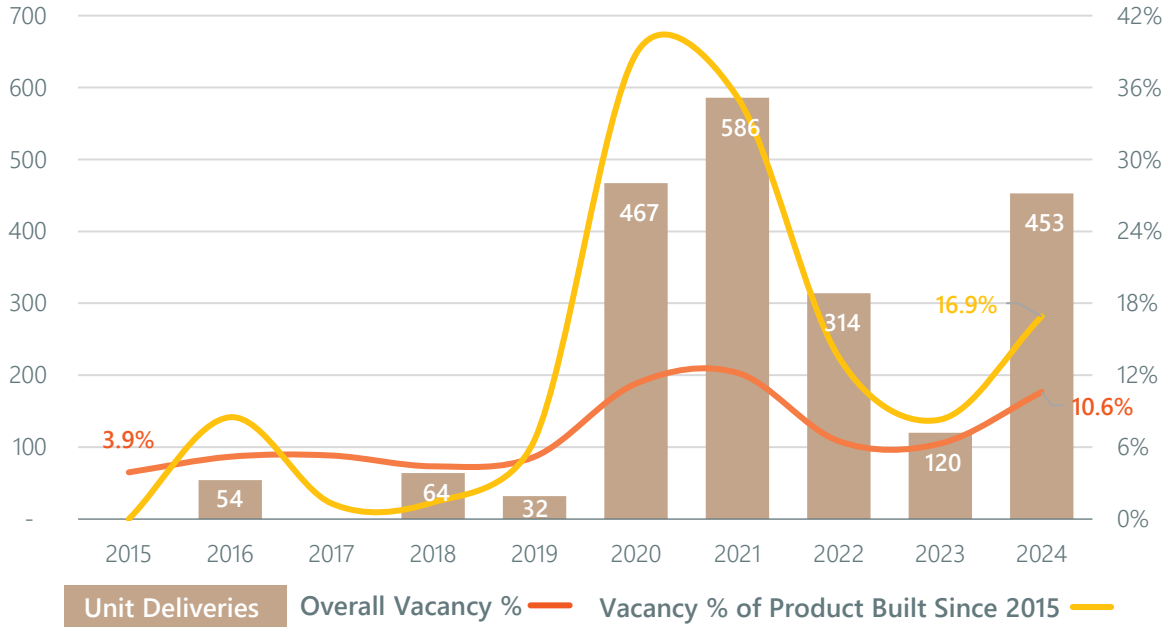
	1 | Acequia Lofts	2 | Olympus de Santa Fe	3 | Capitol Flats	4 | Arthouse
Address	2725 Agua Fria St	995 Richards Ave	950 W Cordova Rd	1952 Siringo Rd
Units (Studio/1B/2BR/3BR+)	120 Units (0/63/57/0)	180 Units (0/68/96/16)	139 Units (20/90/29/0)	129 Units
Year Built	2023	2021	2020	Proposed
Average Unit SF	909 SF	940 SF	676 SF	--
Average Unit Rent	$2,171	$2,250	$2,100	--
Average Rent/SF	$2.39/SF	$2.39/SF	$3.11/SF	--
Parking Type	Detached Garage & Uncovered	Detached Garage & Covered	Uncovered	--

Source: CoStar, SB Friedman

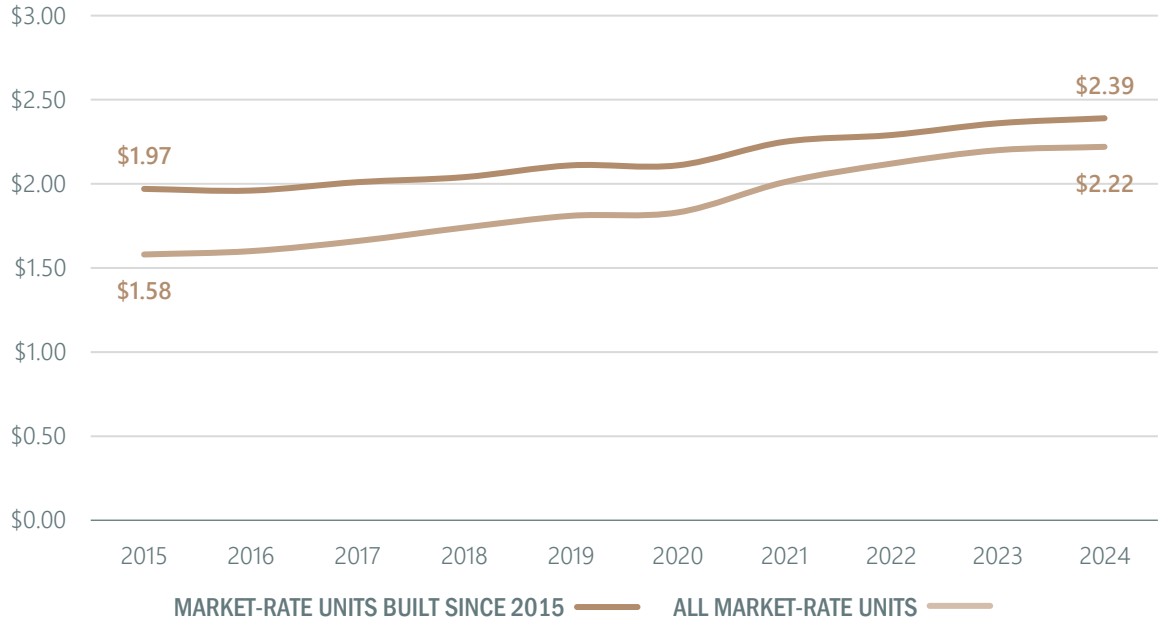
SANTA FE MULTIFAMILY PERFORMANCE

New multifamily units command a ±$0.30/SF rent premium over the market average rent

SANTA FE MARKET-RATE MULTIFAMILY DELIVERIES AND VACANCY, 2015-2024



SANTA FE MARKET-RATE MULTIFAMILY EFFECTIVE RENT PER SF, 2015-2024



- Approximately 2,090 market-rate multifamily rental units have been built in Santa Fe since 2015. After the delivery of more than 450 new units in 2024, the multifamily vacancy rate in Santa Fe reached 10.6% in 2024. Before 2020, when the number of new deliveries sharply increased, vacancy had consistently been around 4-5%.
- Vacancy falls as new product is absorbed. The stabilized vacancy rate is 7.2%.

- Since 2015, market-rate rents across all units have increased from $1.58 per SF to $2.22 per SF, a compound annual growth rate of 3.9%. Average rents for units built since 2015 similarly increased from $1.97 per SF to $2.39 per SF over the same period, a compound annual growth rate of 2.2%.
- Since 2015, new multifamily rental units have had a $0.30-0.39 per SF rent premium relative to the overall market.

Source: CoStar, SB Friedman

SANTA FE OFFICE INVENTORY

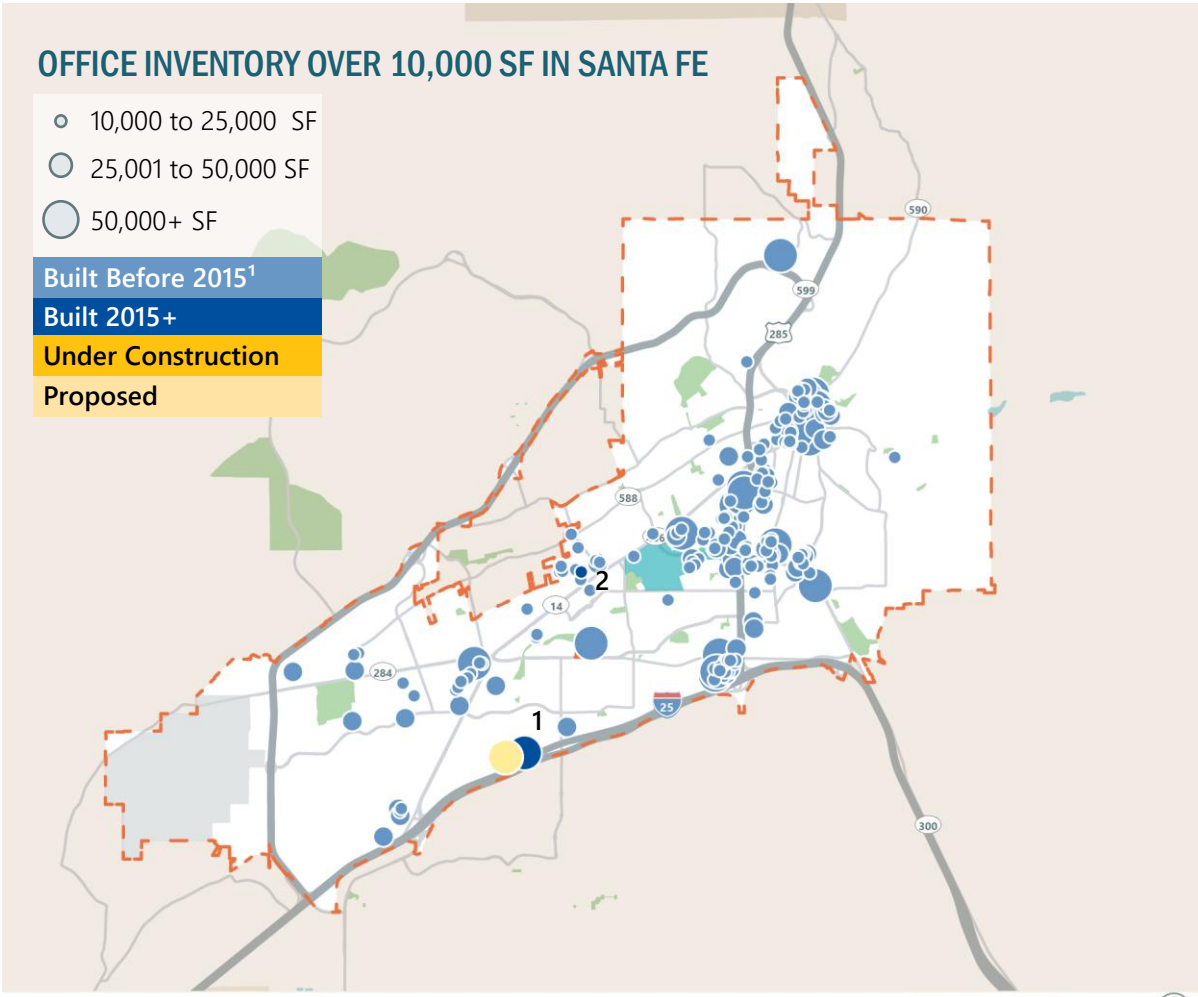
Only 2% of the over 7 million square feet of office space in Santa Fe was built since 2015

- Santa Fe has over 7.16 million SF of existing office space. The overall vacancy rate is 1.6%. Triple-net rents average $23.68 per square foot.
- Approximately 116,000 SF have been delivered since 2015; therefore 98% of the existing office inventory was built before 2015. Much of the office inventory is concentrated downtown, along US-285, or along St. Michael's Drive.

7.16M
TOTAL OFFICE SQUARE FEET

1.6%
OVERALL MARKET VACANCY RATE

$23.68
OVERALL AVERAGE RENT PER SF (NNN)



Map excludes office properties smaller than 10,000 SF

[1]Office properties without year-built values in CoStar are assumed to be built before 2015 and are symbolized as such.
Source: CoStar, SB Friedman

SAMPLE RECENT OFFICE PROJECTS

One large medical user (Nexus Health) is responsible for 82% of new office space built since 2015

	1 | Nexus Health	2 | The Studios at 1300	3 | 530 A Harkle Rd	4 | 301 E Palace Ave
Address	4200 Beckner Rd	1300 Rufina Cir	530 Harkle Rd	301 E Palace Ave
Type	Medical Office	Office and Retail	Medical Office	Office
Tenants	Nexus Health	Palo Santo Designs, Kakawa Chocolate House, Photo-Eye Gallery, Photo-Eye Bookstore	Various professional and medical tenants	
Year Built	2024	2018	2020	2015
RBA	95,000	10,000	2,214	3,614
Average Rent/SF	±$20.25	±$18.48	±$25.49	±$17.64
Class	B	B	B	B

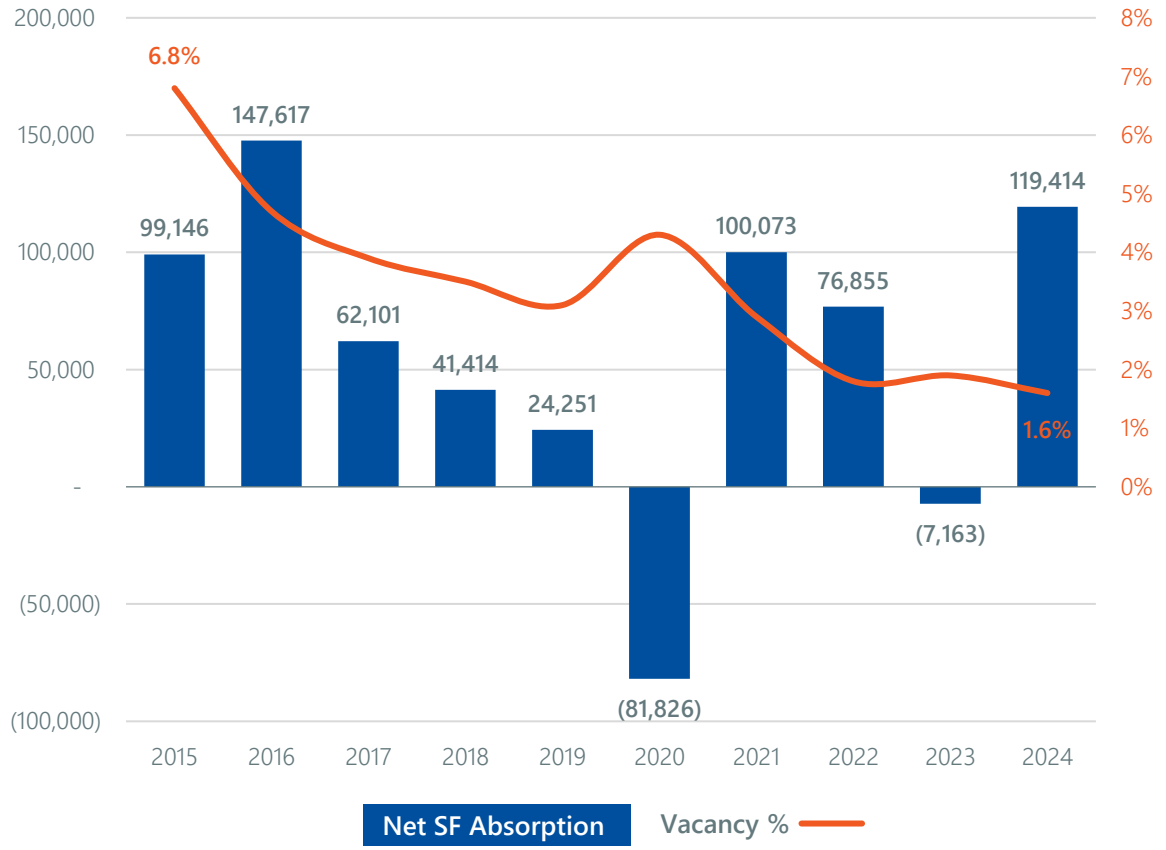
Source: CoStar, SB Friedman

SANTA FE OFFICE PERFORMANCE

Despite the COVID-19 pandemic, net office absorption has been positive in eight of the last ten years

- Net office absorption has remained positive in all but two years since 2015. Net absorption was negative in 2020 due to the COVID-19 pandemic and again in 2023.
- Since new office development has been limited, Santa Fe's office vacancy rate has decreased from 6.8% in 2015 to 1.6% in 2024.
- Continued absorption and a low vacancy rate indicate that Santa Fe's office market is much stronger than in many peer cities, where office performance has been persistently weak since the COVID-19 pandemic.
- Future demand appears to be strong for developers seeking to develop multi-tenant speculative office or larger businesses that seek a build-to-suit office development in a new upcoming mixed-use center. While Midtown is not currently a core office market, its central location in Santa Fe and availability of land could make it a strong contender to capture future office development.

SANTA FE OFFICE ABSORPTION AND VACANCY, 2015-2024



Source: CoStar, SB Friedman

SANTA FE HOTEL INVENTORY

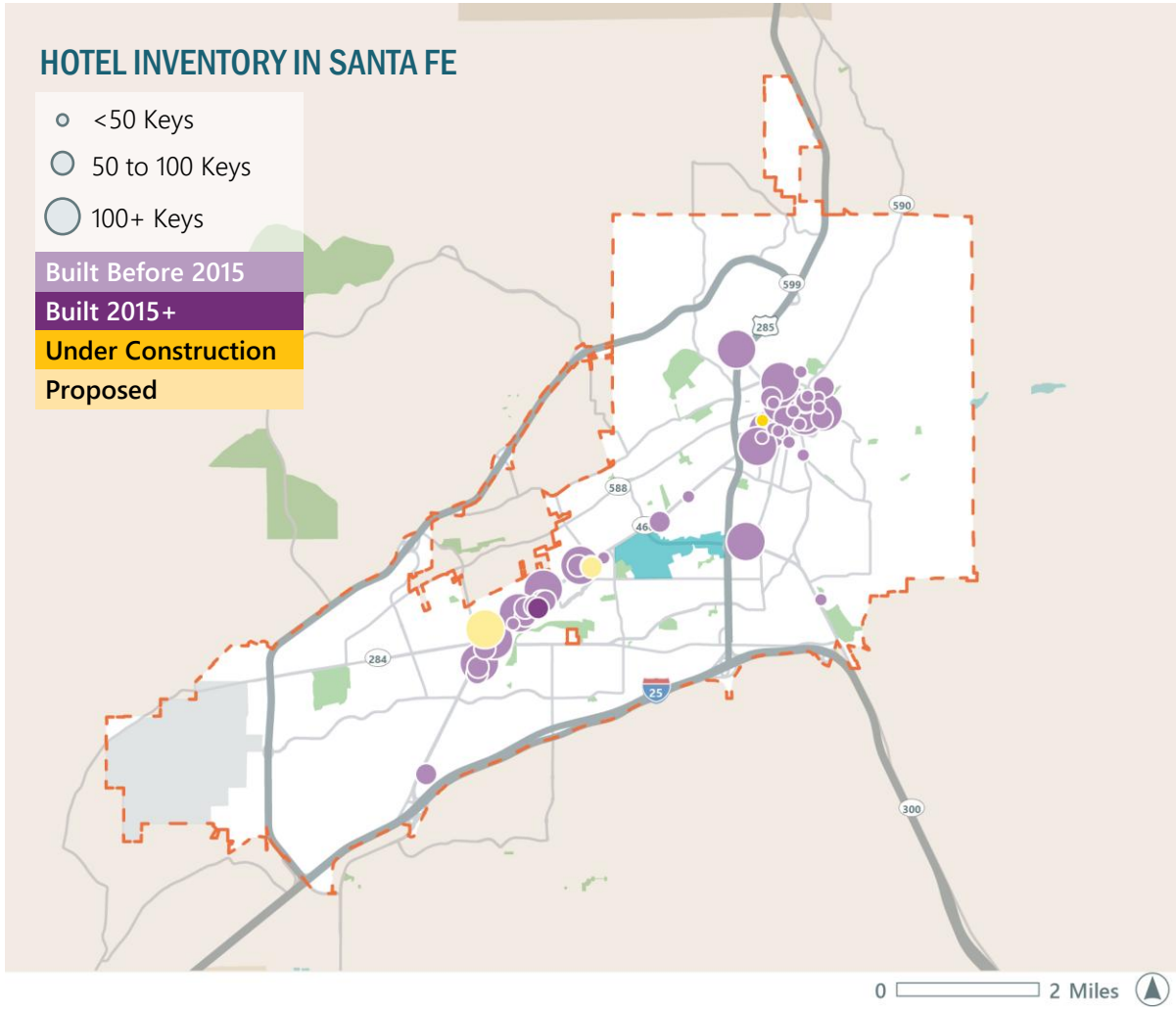
Hotel supply is concentrated near downtown and along Cerrillos Road

- Santa Fe has over 50 hotels with a total of over 4,400 hotel keys. More than 25 hotels are located along Cerrillos Road and another 20 are in the historic downtown.
- There has only been one new hotel built since 2015 (91 keys). However, there are three hotel projects with a total of approximately 220 hotel keys in the pipeline.
- Santa Fe's hospitality market has largely recovered post-COVID. The citywide average occupancy rate is 68%, and the average daily rate is $182.
- Tourism is the primary driver of hotel demand in Santa Fe. *Travel + Leisure* readers recently voted Santa Fe as their #1 favorite city in the United States.
- Santa Fe has attracted an average of two million overnight visitors annually in recent years. The most popular months for visitors are April through October peaking in July and August.

4,430
TOTAL HOTEL KEYS

68.4%
OVERALL MARKET OCCUPANCY RATE

$182
OVERALL HOTEL AVERAGE DAILY RATE

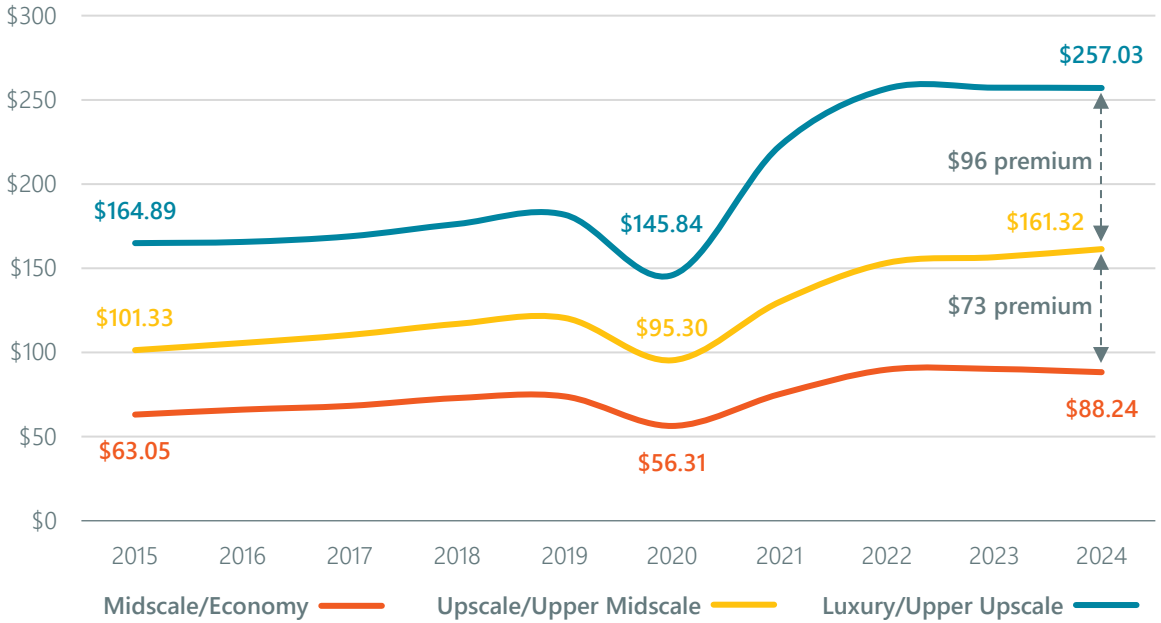


Source: CoStar, TOURISM Santa Fe, SB Friedman

SANTA FE HOTEL PERFORMANCE

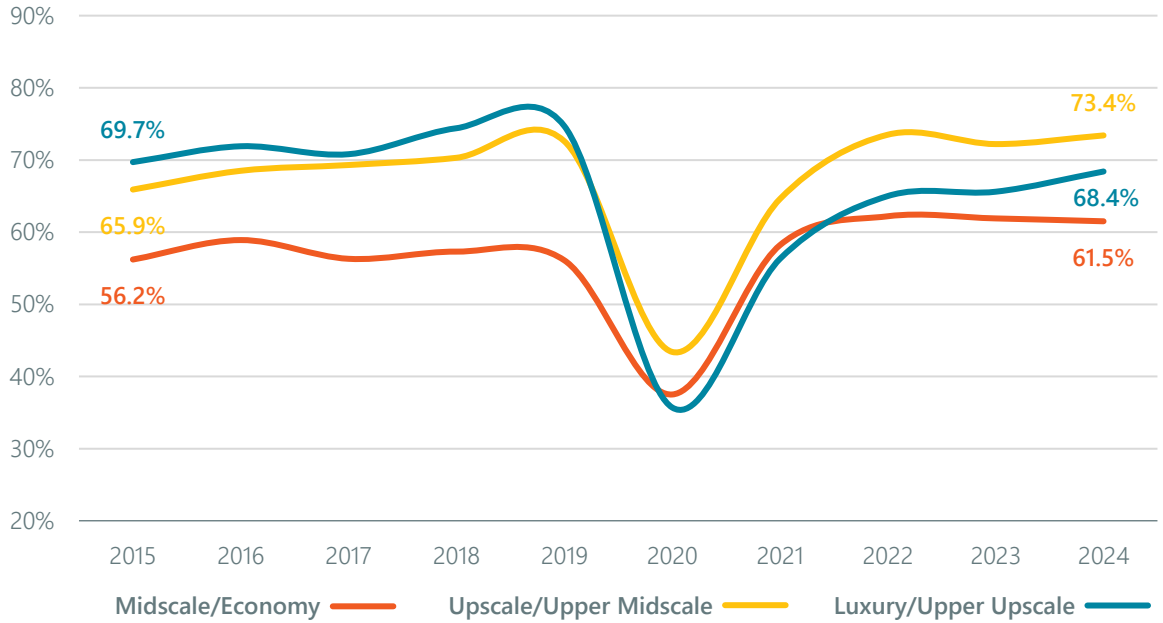
Santa Fe's hospitality market has largely recovered post-COVID

SANTA FE HOTEL AVERAGE DAILY RATE BY CLASS, 2015-2024



- Across all of 2024, the average daily rate was $257 for Luxury/Upper Upscale hotels, $161 for Upscale/Upper Midscale, and $88 for Midscale/Economy hotels. Market-wide rates averaged $182.
- In 2024, Upscale/Upper Midscale hotels had $73 nightly premiums over Midscale/Economy hotels, and Luxury/Upper Scale hotels had $96 nightly premiums over Upscale/Upper Midscale hotels.

SANTA FE HOTEL OCCUPANCY BY CLASS, 2015-2024



- Overall average hotel occupancy was 68% in 2024 but varied by hotel class. Upscale/Upper Midscale hotels performed the strongest, with an overage occupancy of 73%. Midscale/Economy hotels and Luxury/Upscale hotels had an average occupancy of 61.5% and 68%, respectively.
- Hotel occupancy fell sharply during the pandemic, particularly for Midscale/Economy and Luxury/Upper Scale hotels.

Source: CoStar, SB Friedman

SANTA FE RETAIL INVENTORY

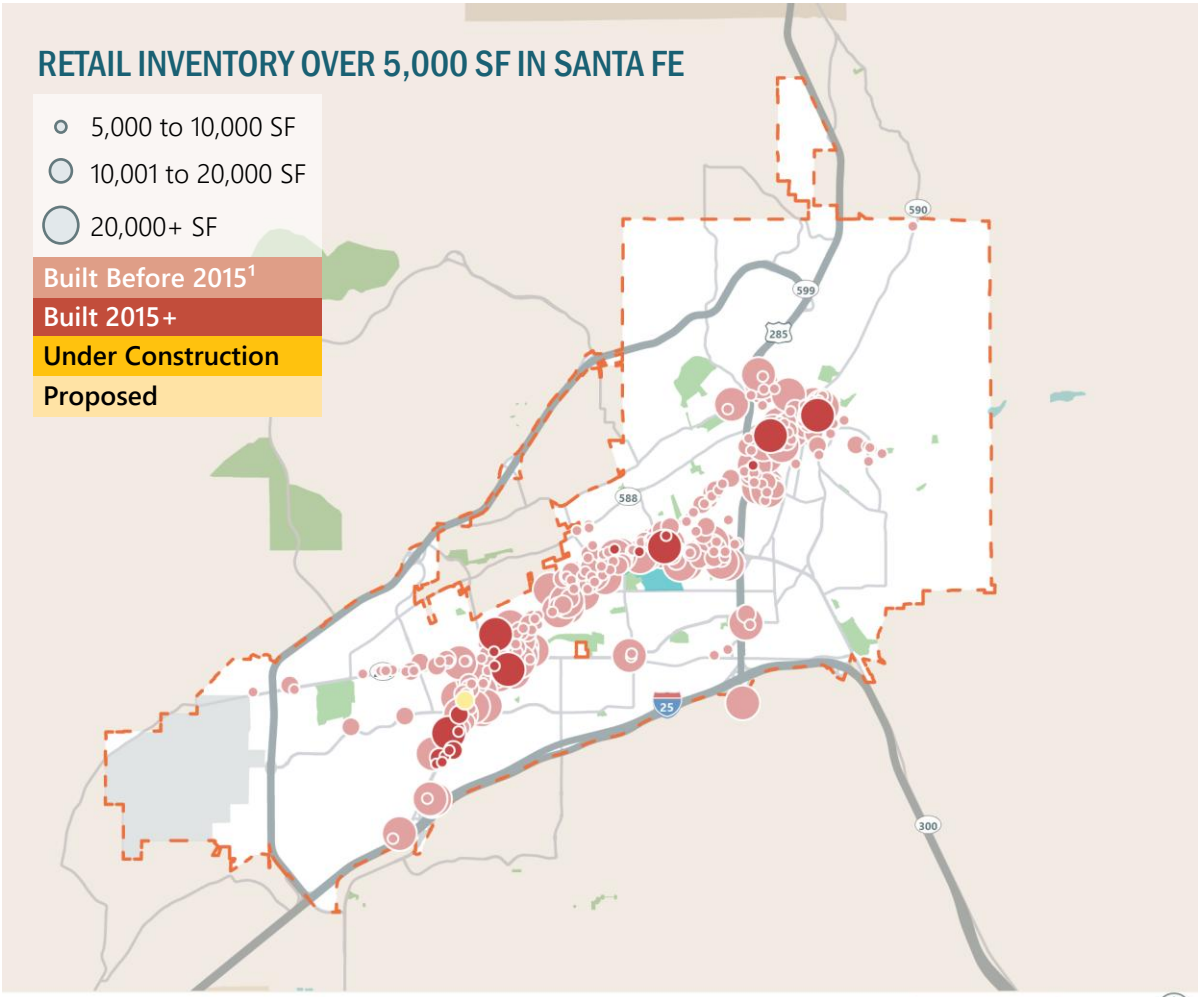
Most retail was built before 2015 and is located along major transportation corridors

- Santa Fe has over 7.27M SF of retail space and an overall market vacancy rate of 2.3%. Average triple-net rent for retail is $18.45 per SF. Most retail space is located along major transportation corridors and in downtown.
- Much of Santa Fe's retail inventory was built before 2015. Less than 350,000 SF (less than 5%) of retail space has been delivered since 2015.

7.27M
TOTAL RETAIL SQUARE FEET

2.3%
OVERALL MARKET VACANCY RATE

$18.45
OVERALL AVERAGE RENT PER SF (NNN)



Map excludes retail properties smaller than 5,000 SF

[1]Retail properties without year-built values in CoStar are assumed to be built before 2015 and are symbolized as such.
Source: CoStar, SB Friedman

RETAIL TYPOLOGIES

Retail centers can be categorized into three major typologies based on several factors

Retail clusters are categorized into three major typologies: Downtown Retail, Regional-Serving and Community-Serving. Typologies differ based on scale, number and type of anchors, and size of trade area. More detail on retail typologies near Midtown and regional retail centers is provided on the following pages.

DOWNTOWN RETAIL

DOWNTOWN / EXPERIENTIAL
- Mixed-use
- Ground-floor retail
- Walkable pedestrian environment
- **SIZE VARIES**

REGIONAL-SERVING →

REGIONAL MALL / SUPER-REGIONAL MALL
- Anchored by 2+ full-line department stores
- ~500,000-1,000,000+ SF

LIFESTYLE CENTER
- Upscale national-chain specialty stores
- Dining/entertainment focus
- ~250,000-500,000 SF

POWER CENTER
- 2+ category-dominant freestanding anchors of ~100,000+ SF
- General merchandise, home improvement
- ~250,000-750,000 SF

COMMUNITY-SERVING →

COMMUNITY CENTER
- 1+ category-dominant freestanding anchors of ~100,000+ SF

-- OR --

- 1+ grocer anchors of ~50,000+ SF and additional category dominant retailers
- ~100,000-250,000 SF

NEIGHBORHOOD CENTER
- 1+ grocer anchors of ~50,000 SF or more
- Additional supporting retail
- ~75,000-150,000 SF

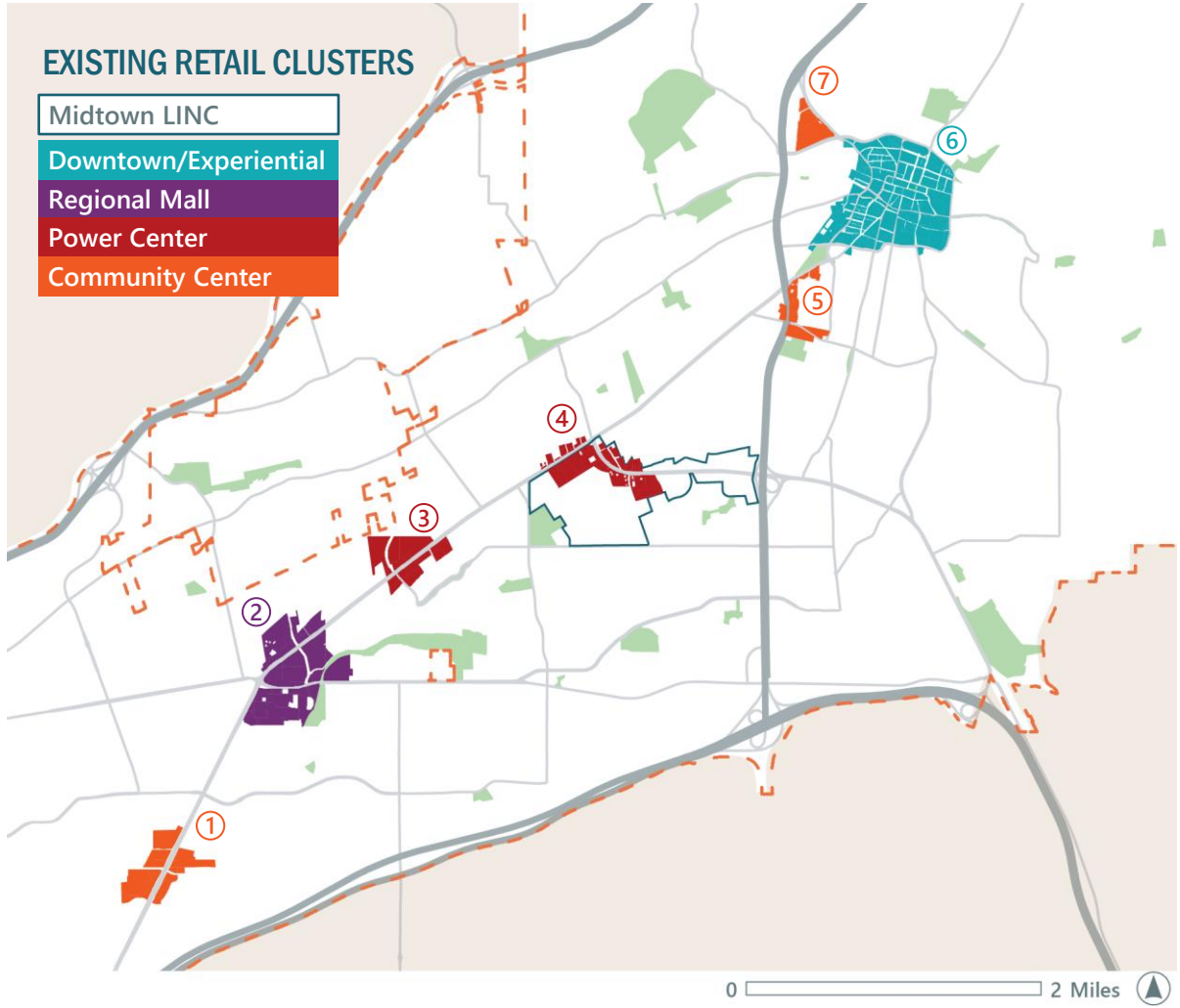
FREESTANDING / STRIP RETAIL
- Small convenience center with goods and services
- Limited trade area
- ~5,000-150,000 SF

EXISTING RETAIL CLUSTERS

The Midtown LINC encompasses a power center containing major anchors

Santa Fe has several retail clusters of various scales, most of which are located along Cerillos Road, the major transportation corridors through the city. Collectively, these retail clusters contain over 5.4 million SF of retail space, or approximately 75% of all retail space in Santa Fe. Clusters include both national and regional anchor tenants as well as local businesses. The Midtown LINC encompasses a power center containing major anchors like Smith's, Office Depot, and Petco.

	Retail Typology	Total SF	Vacancy	Select Tenants
1 | Cerrillos & Tierra Contenta	Community Center	290,132 SF	0%	Walmart, Subaru, Dodge Jeep RAM, Lexus, Dollar Tree, CarMax
2 | Santa Fe Place / Plaza Santa Fe	Regional Mall	1,854,322 SF	2.4%	Hobby Lobby, JCPenney, Dillard's, Target, Albertsons, Sam's Club, Lowe's
3 | Cerrillos & Richards	Power Center	522,006 SF	0.5%	Home Depot, Walmart, Joann Fabric, Savers
4 | Midtown	Power Center	784,562 SF	2.5%	Petco, Smith's, Office Depot, Toyota
5 | Railyard	Community Center	349,783 SF	3.4%	Whole Foods, Natural Grocers, Trader Joe's
6 | Downtown	Downtown / Experiential	1,302,229 SF	0.3%	Smaller-scale and local businesses
7 | Devargas Center	Community Center	347,906 SF	2.1%	Office Depot, Ross, CVS, HomeGoods

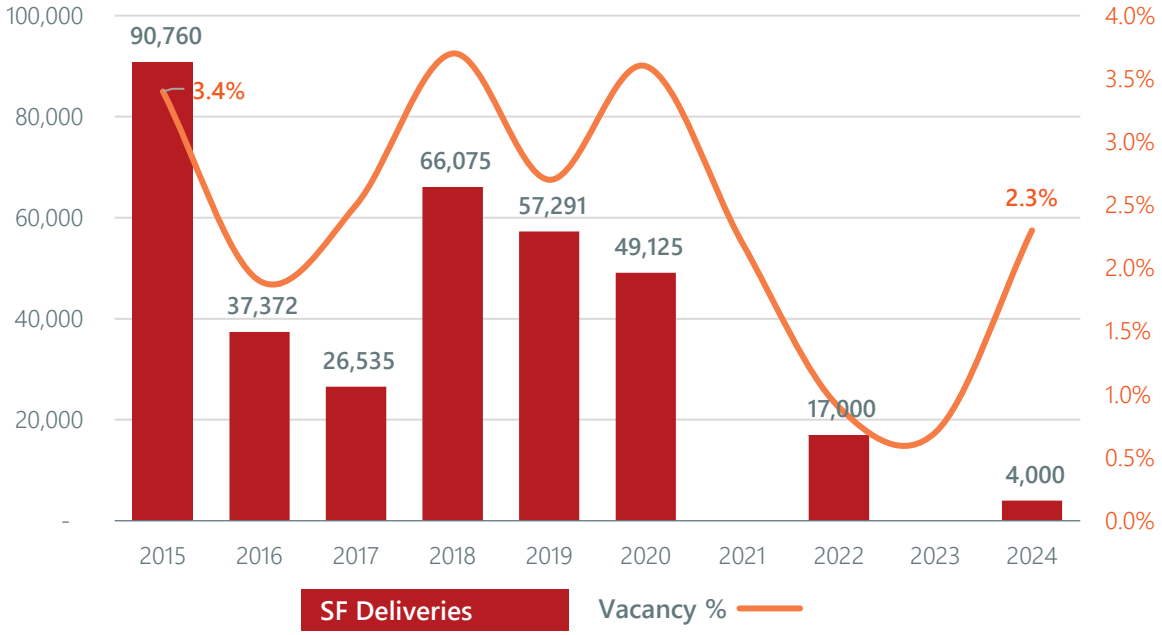


Source: CoStar, SB Friedman

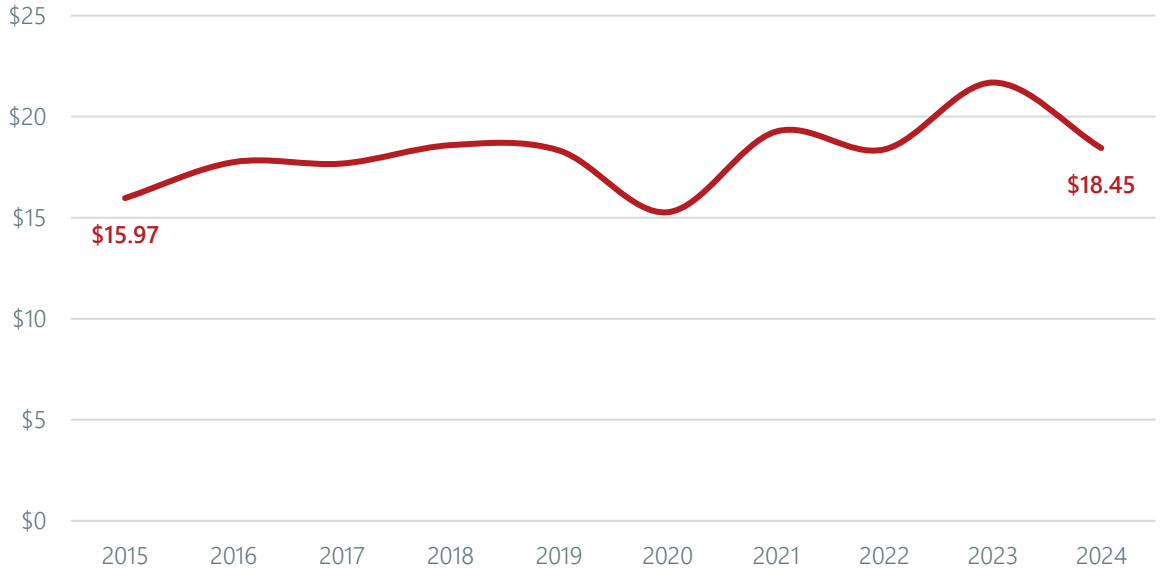
SANTA FE RETAIL PERFORMANCE

Retail rents have increased but deliveries have decreased since the COVID-19 pandemic

SANTA FE RETAIL DELIVERIES AND VACANCY, 2015-2024



SANTA FE RETAIL TRIPLE-NET RENT PER SF, 2015-2024



- Since 2015, 348,000 SF of retail space has been delivered. Deliveries have decreased over time and since 2021, only 21,000 SF of retail space has been delivered.
- Retail vacancy remained low, at or below 3.7% from 2015 to 2024. Retail vacancy reached a low of 0.7% in 2023.

- Average triple-net rent per SF in Santa Fe has increased from $15.97 in 2015 to $18.45 in 2024. Average triple-net rents increased from 2015 until the COVID-19 pandemic when they dropped below the 2015 average to $15.27 per SF. Since 2020, average rents have recovered to above pre-pandemic levels.

Source: CoStar, SB Friedman

MARKET ANALYSIS CONCLUSIONS

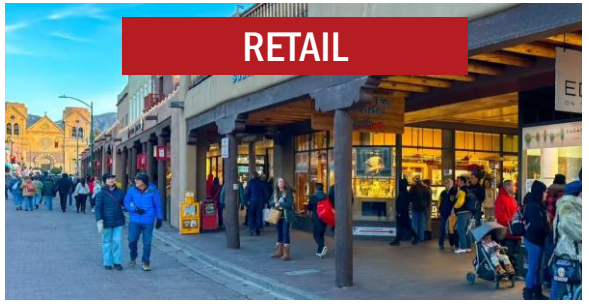
REAL ESTATE MARKET ANALYSIS – MARKET SUMMARY

Santa Fe has strong market potential for a variety of product types

The Santa Fe multifamily market is strong. Over 2,000 units have been built since 2015, with more than 1,000 additional units under construction. There is one project (129 units) in the pipeline for the Midtown LINC. Short-term, there may be a temporary slowdown in multifamily development given market uncertainty.

New speculative office deliveries have been fairly limited since 2015, which has led to very low vacancy. The State cannot pay the rents needed to support new office construction, but there may be demand for new space from medical users, National Lab spinoffs, federal agencies, or private businesses willing to pay higher rents associated with new class A office.

Tourism is the primary driver of hotel demand in Santa Fe. Hotels in Santa Fe are primarily clustered downtown or along Cerillos Road. Overall market occupancy has recovered to pre-pandemic levels, with Upscale/Upper Midscale class hotels performing especially well. ADR growth has been strong since 2020.



Retail is generally performing well in Santa Fe, particularly in the primary retail clusters like at Midtown. Overall market vacancy continues to be low. However, rent growth and new deliveries have both slowed in recent years.

REAL ESTATE MARKET ANALYSIS – DEVELOPMENT POTENTIAL

Multifamily, mixed-use, and retail development is most viable in the near-term

MARKET POTENTIAL

STRONG

10-YEAR DEMAND

800 UNITS

Midtown Santa Fe could accommodate development beyond the current pipeline. Developing market rate housing along with affordable housing can simultaneously help create a mixed-income neighborhood and help address regional housing needs.

MARKET POTENTIAL

STRONG

10-YEAR DEMAND

150,000 SF

Demand appears to be strong for speculative office citywide. Midtown's central location and availability of land could make it a strong contender to capture future office development, though any development at Midtown should complement the mixed-use neighborhood vision.

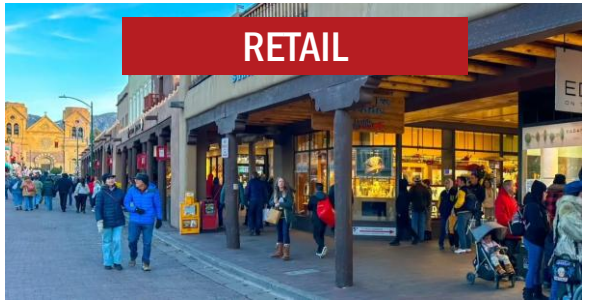
MARKET POTENTIAL

MODERATE

10-YEAR DEMAND

250 KEYS

Hotel development could potentially be feasible at Midtown after initial phases of development. Future hotel development should include a mix of hotel types (i.e., larger conference hotels and smaller boutique hotels) to capture different travel sectors. Hotel visitors to the area could help support the retail and add to the tax base.



MARKET POTENTIAL

MODERATE

10-YEAR DEMAND

120,000 SF

Future retail in Midtown is likely to be ground-floor retail in mixed-use buildings or standalone, specialty retail. Sites within the Midtown campus lacking frontage on the main roads should seek to attract destination retail and entertainment users that can draw customers from a wider geography.

Source: CoStar, Google, SB Friedman

SBFRIEDMAN

70 W Madison St, Suite 3700
Chicago, IL 60602
312-424-4250 | sbfriedman.com

VISION | ECONOMICS

MARKET ANALYSIS AND REAL ESTATE ECONOMICS

STRATEGY

DEVELOPMENT STRATEGY AND PLANNING

FINANCE | IMPLEMENTATION

PUBLIC-PRIVATE PARTNERSHIPS AND IMPLEMENTATION

FIR No. 10757.1

FISCAL IMPACT REPORT

General Information:

(Check) **Bill:** _____ **Resolution:** X

Short Title(s): Approving the Midtown Metropolitan Redevelopment Area Plan

Sponsor(s): Councilor Jamie Cassutt, Councilor Amanda Chavez, and Mayor Michael Garcia

Reviewing Department(s): Metropolitan Redevelopment Agency Department

Staff Completing FIR: Carly Venditti, MRA Department Deputy Director
Date: 5/5/2026 **Phone:** 505-795-0675

Reviewed by City Attorney: Marcos D. Martinez Marcos D. Martinez (May 7, 2026 16:22:39 MDT) **Date:** 05/07/2026

Reviewed by Finance Director: ANDREA PHILLIPS (May 8, 2026 15:03:20 MDT) **Date:** _____

Summary:
The proposed resolution would approve the Midtown Metropolitan Redevelopment Area Plan ("Plan") for the City of Santa Fe ("City"). Pursuant to NMSA 1978, Section 3-60A-9, the proposed resolution would determine that the Plan will help eliminate or prevent blight, conforms to the City's General Plan, and affords maximum opportunity consistent with the needs of the community for the redevelopment of the Midtown Metropolitan Redevelopment Area by private enterprises or persons. The Plan also does not include proposed activities that require displacement or relocation of any families or individuals, and a method for providing displacement or relocation accommodations is not needed.

Departments Affected:
Midtown Metropolitan Redevelopment Agency Department

Consequences of Not Enacting Legislation:
If this legislation is not adopted, then the Midtown Metropolitan Redevelopment Area Plan would not be approved, and the Metropolitan Redevelopment Agency would not be able to exercise its supervisory role over Midtown, nor could it make recommendations to the Governing Body. Further, the City of Santa Fe would not be able to pursue a Tax Increment Financing District as proposed in the Metropolitan Redevelopment Plan.

Conflict, Duplication, Companionship, or Relationship to Other Legislation:
The City designated the area as a Metropolitan Redevelopment Area through Resolution No. 2025-42.

Performance and Administrative Implications:
The Metropolitan Redevelopment Plan solidifies the Metropolitan Redevelopment Commission's ability to carry out the Midtown Redevelopment plans and make recommendations aligned to eliminate and alleviate identified blight conditions.

Fiscal Implications:
None.

Fiscal Impact

_____ Check here if no fiscal impact

Expenditures

Expenditure Type	FYE 2026	FYE 2027	FYE 2028	Require BAR (Y/N)	Recurring (R) or Non-recurring (NR)	Fund	3-Year Total Cost
Personnel and Benefits*	$	$	$				
Capital Outlay	$	$	$				
Contractual/ Professional Services	$	$	$				
Operating	$	$	$				$
Total:	$	$	$				$

Expenditure Narrative:

Revenue

Revenue Type	FYE 2026	FYE 2027	FYE 2028	Recurring (R) or Non-recurring (NR)	Fund
General Fund	$	$	$		
Special Revenue	$	$	$		
CIP	$	$	$		
Enterprise	$	$	$		
Internal Service	$	$	$		
Trust and Agency	$	$	$		
Federal	$	$	$		
Other	$	$	$		
Total	$	$	$		

Revenue Narrative:

Signature: Carly Venditti

Email: cavenditti@santafenm.gov

Date: March 19, 2026

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

Via: Thomas Grundler, Interim Chief of Police TJG

From: Ben Valdez, Deputy Chief of Police BV

RE: Defining aggressive driving and establishing penalties and creating the Police and Fire Resiliency Fund

---

EXECUTIVE SUMMARY:

The adoption of this bill would create a new subsection of Article VI of the Uniform Traffic Ordinance ("UTO"), Exhibit A of Chapter 24 of SFCC 1987 to define, criminalize, and penalize "aggressive driving". It specifies that every person convicted of aggressive driving shall be required to comply with a mandatory court appearance and be punished as follows:

1) Upon a first conviction by fine of two hundred and fifty dollars ($250);
2) Upon a second conviction, by imprisonment for seven days, and by a fine of five hundred dollars ($500);
3) Upon a third conviction, by imprisonment for fourteen days and a fine of five hundred dollars ($500);
4) Upon subsequent convictions, imprisonment for ninety days and a fine of five hundred dollars ($500).

The bill includes a provision specifying that the court shall permit people convicted of aggressive driving who are determined to be indigent to perform community service in lieu of payment of fines; however, this does not prevent the court from sentencing the person to jail, if applicable.

Additionally, the bill amends Article VI of the UTO, Subsection 12-6-12.3, SFCC 1987, "Reckless Driving," to accomplish the following changes to the reckless driving fines:

1) Eliminates the concept of minimum penalties;
2) Upon first conviction, raises the maximum penalty from twenty-five dollars ($25) to two hundred and fifty dollars ($250);
3) Upon second conviction, raises the maximum penalty from three hundred dollars ($300) to five hundred dollars ($500).

Lastly, the bill creates a section in the UTO called the "Police and Fire Resiliency Funds". Upon adoption of the ordinance, and in compliance with Section 2-2.4, SFCC 1987, all fines collected for violations of the UTO, Schedule A, for aggressive driving, and for reckless driving shall be allocated fifty percent (50%) to the Law Enforcement Fund and fifty (50%) to the Fire Support Services Fund, with the exception of fines collected for speeding (which are allocated toward the Traffic Calming Program).

ATTACHMENTS

Bill
FIR

CITY OF SANTA FE, NEW MEXICO

BILL NO. 2026-9

INTRODUCED BY:

Councilor Pilar Faulkner

Councilor Lee Garcia

Councilor Amanda Chavez

A BILL

AMENDING SUBSECTION 12-6-12.3 OF ARTICLE VI OF THE UNIFORM TRAFFIC ORDINANCE ("UTO") TO ELIMINATE MINIMUM PENALTIES FOR RECKLESS DRIVING AND RAISING MAXIMUM PENALTIES FROM TWENTY-FIVE DOLLARS ($25) TO TWO HUNDRED AND FIFTY DOLLARS ($250) FOR FIRST CONVICTIONS AND FROM THREE HUNDRED DOLLARS ($300) TO FIVE HUNDRED DOLLARS ($500) FOR SECOND OR SUBSEQUENT CONVICTIONS; CREATING A NEW SUBSECTION 12-6-12.4A OF ARTICLE VI OF THE UTO, EXHIBIT A TO CHAPTER 24, SFCC 1987 TO DEFINE, CRIMINALIZE, AND PENALIZE "AGGRESSIVE DRIVING"; AMENDING THE UTO'S SCHEDULE A TRAFFIC VIOLATION PENALTY ASSESSMENT SCHEDULE TO INCREASE CERTAIN PENALTIES, TO SPECIFY THAT ALL RECKLESS DRIVING FINES, AGGRESSIVE DRIVING FINES, AS WELL AS ALL SCHEDULE A PENALTIES (EXCEPT FOR THOSE DEDICATED TO TRAFFIC CALMING) SHALL BE SPLIT EQUALLY BETWEEN THE LAW ENFORCEMENT FUND AND THE FIRE SUPPORT SERVICES FUND, AND TO REQUIRE A MANDATORY COURT APPEARANCE FOR VIOLATIONS RELATED TO

underscored material = new [~~bracketed material~~] = delete

AGGRESSIVE DRIVING; CREATING A NEW SUBSECTION 12-6-12.25 OF ARTICLE VI "ENGAGING IN PROLONGED, DELIBERATE, AND/OR EXCESSIVE TAILING OF ANOTHER VEHICLE" AND ESTABLISHING A PENALTY IN SANTA FE'S UTO, SCHEDULE A, TRAFFIC VIOLATION PENALTY ASSESSMENT SCHEDULE FOR THE SAME; CREATING A NEW SUBSECTION 12-6-12.26 OF ARTICLE VI "UNSAFE SUDDEN STOPS" AND ESTABLISHING A PENALTY IN SANTA FE'S UTO, SCHEDULE A, TRAFFIC VIOLATION PENALTY ASSESSMENT SCHEDULE FOR THE SAME; CREATING A NEW SUBSECTION 12-6-12.27 OF ARTICLE VI "THROWING ITEMS OUTSIDE OF VEHICLE AT ANOTHER VEHICLE OR AT A PEDESTRIAN" AND ESTABLISHING A PENALTY IN SANTA FE'S UTO, SCHEDULE A, TRAFFIC VIOLATION PENALTY ASSESSMENT SCHEDULE FOR THE SAME.

BE IT ORDAINED BY THE GOVERNING BODY OF THE CITY OF SANTA FE:

Section 1. Section 12-6-12.3 of the Uniform Traffic Ordinance, Exhibit A, Section 24, of SFCC 1987 (being Ordinance No. 2011-25, § 5) is hereby amended to read:

12-6-12.3 – Reckless Driving.

A. Any person who drives any vehicle carelessly and heedlessly in willful or wanton disregard of the rights or safety of others and without due caution and circumspection and at a speed or in a manner so as to endanger or be likely to endanger any person or property is guilty of reckless driving.

B. A person operating a motor vehicle shall not endanger a bicyclist.

C. Every person convicted of reckless driving shall be punished:

1) Upon a first conviction by imprisonment for not less than five days nor more than ninety days, or by a fine of [~~not less than twenty-five dollars ($25.00) nor more than one hundred dollars ($100.00~~] $250.00), or both; and

2) On a second or subsequent conviction by imprisonment for not less than ten days nor more than ninety days, or by a fine of [~~not less than fifty dollars ($50.00) nor more than three hundred dollars ($300.00~~] ($500), or both. (66-8-113 NMSA, 1978)

3) All fines collected for reckless driving shall be allocated fifty percent (50%) to the Law Enforcement Fund and fifty percent (50%) to the Fire Support Services.

Section 2. [NEW MATERIAL] A new Section 12-6-12.4A of the Uniform Traffic Ordinance, Exhibit A, Section 24, of SFCC 1987 is hereby ordained to read:

12-6-12.4A - AGGRESSIVE DRIVING.

A. Any person who during the course of conduct operates a vehicle in a manner that endangers or is likely to endanger people or property is guilty of aggressive driving if during the course of conduct, the person commits two or more of the following violations:

(1) Failure to obey traffic-control devices, Section 12-5-3;

(2) Failure to comply with rules to safely overtake a vehicle on the left as described in Sections 12-6-2.3, 12-6-2.4, and 12-6-2.5;

(3) Failure to drive on streets laned for traffic as described in Section 12-6-2.12;

(4) Following too closely, Section 12-6-2.13;

(5) Failure to yield right of way, Section 12-6-4;

(6) Engaging in prohibited activities while driving, Section 12-6-12.18;

(7) Racing on streets, Section 12-6-12.19;

(8) Engaging in prolonged, deliberate, or excessive tailing of another vehicle, Section 12-6-12.25;

(9) Unsafe sudden stops, Section 12-6-12.26; and/or

(10) Throwing items outside of vehicle at another vehicle or at a pedestrian, Section 12-6-12.27.

B. For the purposes of this section, “course of conduct” means a series of acts committed

during a single, continuous period of driving.

C. Every person convicted of aggressive driving shall be required to comply with a mandatory court appearance and shall be punished as follows:

(1) Unless otherwise specified in Schedule A of the Uniform Traffic Ordinance, SFCC 1987, upon a first conviction by a fine of two hundred fifty dollars ($250);

(2) Upon a second conviction by imprisonment for seven days, and a fine of five hundred dollars ($500);

(3) Upon a third conviction by imprisonment for fourteen days and a fine of five hundred dollars ($500); and

(4) Upon subsequent convictions by imprisonment for ninety days and a fine of five hundred dollars ($500).

D. If the person convicted of aggressive driving is determined to be indigent, the court shall permit the individual to perform community service in lieu of payment of fines; however, this does not prevent the court from sentencing the person to jail, if applicable.

E. All fines collected for reckless driving shall be allocated fifty percent (50%) to the Law Enforcement Fund and fifty percent (50%) to the Fire Support Services.

Section 3. [NEW MATERIAL] A new Subsection 12-6-12.25 of Article VI of the Uniform Traffic Ordinance, Exhibit A, Chapter 24 of SFCC 1987 is hereby ordained to read:

12-6-12.25 – ENGAGING IN PROLONGED, DELIBERATE, AND/OR EXCESSIVE TAILING OF ANOTHER VEHICLE.

No person shall change their route, direction, or course of travel in order to aggressively follow another vehicle such that the following is prolonged, excessive, and/or deliberate.

Section 4. [NEW MATERIAL] A new Section 12-6-12.26 of Article VI of the Uniform Traffic Ordinance, Exhibit A, Chapter 24 of SFCC 1987 is hereby ordained to read:

12-6-12.26 – UNSAFE SUDDEN STOPS.

No person shall suddenly apply their brakes while another driver is following in a manner that unnecessarily impedes or obstructs the normal and reasonable flow of traffic, except when the stop is required for safe operation of the vehicle or to comply with the law.

Section 5. [NEW MATERIAL] A new Section 12-6-12.27 of Article VI the Uniform Traffic Ordinance, Exhibit A, Chapter 24 of SFCC 1987 is hereby ordained to read:

12-6-12.27 – THROWING ITEMS OUTSIDE OF VEHICLE AT ANOTHER VEHICLE OR AT A PEDESTRIAN.

No person shall throw, toss, or otherwise project any object or substance from a vehicle, whether the vehicle is moving or stopped, at another vehicle or at any pedestrian, bicyclist, or other person using the roadway.

Section 6. Schedule A of Exhibit A of Chapter 24 (Uniform Traffic Ordinance) of SFCC 1987 (being Ordinance No. 2025-6 as amended) is amended to read:

SECTION 1.

This Exhibit may be cited as the city of Santa Fe traffic violation penalty assessment schedule for violations of the city of Santa Fe Uniform Traffic Code except those violations relating to parking which are set forth as Exhibit B of the city of Santa Fe Uniform Traffic Code.

SECTION 2.

"Penalty assessment petty misdemeanor" means violation of the following listed sections of the city of Santa Fe Uniform Traffic Code for which the listed penalty assessment is established. The term "penalty assessment petty misdemeanor" does not include any violation which has caused or contributed to the cause of an accident resulting in injury or death to any person. When an alleged violator of a penalty assessment petty misdemeanor elects to accept a notice to appear in lieu of a notice of penalty assessment, the fine imposed upon later conviction shall not exceed the penalty assessment established for the particular penalty assessment petty misdemeanor and probation imposed upon a suspended or deferred sentence may include community service as contemplated

in Section 1-3.1 and shall not exceed ninety days.

COMMON NAME OF OFFENSE	**SECTION VIOLATED**	**PENALTY ASSESSMENT**
Obedience [~~T~~]to Traffic-Control Devices/Failure [~~T~~]to Stop	12-5-3	$25.00
Red Light	12-5-6	$25.00
Pedestrian Controls	12-5-7	$25.00
Flashing Signals	12-5-8	$25.00
Display of Unauthorized Signs, Signals, or Markings	12-5-10	$25.00
Basic (Speeding) Rule	12-6-1.1	$25.00
Speed Limits	12-6-1.2	
A. The following apply outside a school zone:		
Up to and including 10 miles an hour over speed limit		$15.00
From 11 up to and including 15 miles an hour over speed limit		$30.00
From 16 up to and including 20 miles an hour over speed limit		$65.00
From 21 up to and including 25 miles an hour over speed limit		$100.00
From 26 up to and including 30 miles an hour over the speed limit		$125.00
From 31 up to and including 35 miles an hour over the speed limit		$150.00
More than 35 miles an hour over the speed limit		$200.00
B. In a school zone	12-6-1.2A	$171.00
C. In a construction zone: The penalty assessment for speeding in violation of Section 12-6-1.2 (4) of the city of Santa Fe traffic ordinance is twice the penalty assessment established in subsection A above for the equivalent miles per hour over the speed limit		

D. In a pedestrian zone. The penalty assessment for speeding in violation of the posted speed limit in a designated pedestrian zone is twice the penalty assessment established in subsection A above for the equivalent miles per hour over the speed limit.		
Minimum Speed Regulations	12-6-1.5	$25.00
Driving [~~O~~]on Right Side [~~O~~]of Street	12-6-2.1	$25.00
Overtaking [~~A~~]a Vehicle [~~O~~]on [~~T~~]the Left	12-6-2.3	$25.00
Limitations [~~O~~]on Overtaking [~~O~~]on [~~T~~]the Left	12-6-2.4	$25.00
Overtaking [~~A~~]a Vehicle [~~O~~]on [~~T~~]the Right	12-6-2.6	$25.00
No Passing Zones/Restrictions [~~O~~]on Passing	12-6-2.7	$25.00
Streets Laned [~~F~~]for Traffic	12-6-2.12	$25.00
Following [~~T~~]too Closely	12-6-2.13	$25.00
Driving [~~O~~]on Divided Streets	12-6-2.14	$25.00
Driving Vehicle [~~O~~]on [~~O~~]or Across Bicycle Lane [~~O~~]or Path	12-6-2.17	$25.00
Turning Left [~~A~~]at Intersection	12-6-4.2	$25.00
Entering Stop/Yield Intersection/Failure [~~T~~]to Yield	12-6-4.3	$25.00
Required Position/Method of Turning/Improper Turn	12-6-5.1	$25.00
Obedience [~~T~~]to No-Turn Signs	12-6-5.4	$25.00
Limitations [~~O~~]on Turning Around/Illegal U-Turn	12-6-5.5	$25.00
Starting [~~A~~]a Parked Vehicle	12-6-5.7	$25.00
Turn/Stop Movements	12-6-5.8	$25.00
Failure [~~T~~]to Signal	12-6-5.9	$25.00
Motorist Turning Across Bicycle Lane	12-6-5.11	$25.00

Stopping, Standing & Parking	12-6-6	See Exhibit B
Special Stops Required	12-6-7 (Excluding 12-6-7.3, 12-6-7.4, 12-6-7.5 and 12-6-7.7)	$25.00
Stopping [~~F~~]for School Bus	12-6-7.3	$100.00
Failure [~~T~~]to Stop [~~A~~]at Railroad Crossing	12-6-7.5 and 12-6-7.7	$150.00
Operators and Chauffeurs Must Be Licensed	12-6-12.5	$25.00
Driving While License Suspended/Administratively Suspended	12-6-12.6 and 12-6-12.6A	$25.00
Driving While License Revoked	12-6-12.6B	$300-$500
Unattended Motor Vehicle	12-6-12.8	$25.00
Limitations [~~O~~]on Backing	12-6-12.9	$25.00
Restriction [~~O~~]on Use of Video [~~I~~]in Motor Vehicles	12-6-12.11	$25.00
Coasting Prohibited	12-6-12.12	$25.00
Prohibited Activities While Driving (including hand held mobile communication device use)	12-6-12.18	$200.00
Mobile communication device use while driving in a school zone	12-6-12.18	$300.00
For subsequent violation		$500
Permitting Unauthorized Persons [~~T~~]to Drive	12-6-12.23	$25.00
Prolonged, deliberate, or excessive tailing of another vehicle	12-6-12.25	$250
for subsequent violations		$500
Unsafe, Sudden Stops, 1st offense	12-6-12.26	$250
for subsequent violations		$500
Throwing Items Outside of Vehicle at Another Vehicle	12-6-12.27	$250

or at a Pedestrian, 1st offense		
for subsequent violations		$500
Destructive Material [~~O~~]on Roadway/Failure [~~T~~]to Secure Load	12-6-13.5	$100.00
Improper Opening [~~O~~]of Doors	12-6-13.8	$25.00
Child Restraint Device [~~O~~]or Safety Belt	12-6-13.12	$100.00
Mandatory Use [~~O~~]of Seat Belts	12-6-13.13	$100.00
Open Container, 1st Offense	12-6-13.14	$100.00
for subsequent violations		mandatory court appearance
Jaywalking	12-6 13.15 through 12-6-14.8	$25.00
Littering	12-6-13.15	$300.00
Unsafe Median Use	12-6-14.9	$25.00
Windshield	12-10-1.12	$25.00
When Lighted Lamps [~~A~~]are Required	12-10-1.3	$25.00
Headlamps [~~O~~]on Vehicles	12-10-1.5	$25.00
Dimming [~~O~~]of Lights	12-10-1.6	$25.00
Tail Lamps	12-10-1.7, except 12-10-1.7C	$25.00
Plate Light Required	12-10-1.7C.	$10.00
Stop Lamps/Brake Lamps	12-10-1.9	$25.00
Mufflers, Prevention [~~O~~]of Noise	12-10-1.10	$500.00
Lamp or Flag on Projecting Load	12-10-1.11	$25.00
Windshield Must be Unobstructed and Equipped with Wipers and Windows Must be Transparent	12-10-1.12	$25.00

Tinted Windows	12-10-1.12A	$25.00
Unsafe Equipment (Brakes)	12-10-1.16	$25.00
Display of Current Valid Registration Plate	12-10-4	$25.00

SECTION 3. MANDATORY COURT APPEARANCES.

Violations of the following listed sections of the city of Santa Fe Uniform Traffic Code require a mandatory court appearance:

Leaving the Scene of an Accident	12-4-2
Failure to Render Aid/Duty to Give Info	12-4-3
Immediate Notice of Accident	12-4-6
Failure to Yield to Emergency Vehicle	12-6-7.4
Reckless Driving	12-6-12.3
Careless Driving/Driver Inattention	12-6-12.4
Aggressive Driving	12-6-12.4A
Operator/Chauffeur Licenses Required	12-6-12.5
Unlawful Use of License (Revoked)	12-6-12.6
Unlawful Use of License (Suspended)	12-6-12.6
Fleeing or Attempting to Elude an Officer	12-6-12.7
Racing on Streets/Drag Racing/Exhibition of Speed	12-6-12.19
Open Container 2 nd , 3 rd , etc.	12-6-13.14
Off-Highway Motor Vehicles (ATV)	12-7-9 through 12-7-9.6
Display of Current Registration	12-10-4
Evidence of Registration	12-10-5
Mandatory Financial Responsibility (Insurance)	12-10-6

SECTION 4. TRAFFIC CALMING FEES.

A. Persons violating speed limits within the city have created a need for traffic calming. The governing body has determined that those persons violating the speed limits should pay additional fees. The purpose of the additional fees is to discourage speeding within the city and to provide funds for the city's traffic calming program.

B. The city hereby imposes a traffic calming fee equal to the maximum fine (excluding court fees) to be paid by any person convicted of a speeding violation as set forth in the Uniform Traffic Ordinance as adopted by the city, the total of which shall not exceed the jurisdictional limits of the court. The traffic calming fee applies to all violations of Section 12-6-1.2, but the traffic calming fee is not doubled.

C. The traffic calming fee shall be collected by the municipal court for funding the city's traffic calming program. The amount of fees collected shall not decrease the amount of money allocated to the traffic calming program through the current fiscal year Capital Improvement Program bonding process.

D. The governing body shall review the results of this subsection including the amount of fees which have been collected and the amount of police overtime because of this subsection. The municipal court shall provide the governing body with the appropriate statistics to review this subsection.

SECTION 5. <u>POLICE AND FIRE RESILIENCY FUNDS</u>

<u>Consistent with NMSA 1978, sec. 35-15-12, all fees collected for violations of the city of Santa Fe's Uniform Traffic Ordinance, Schedule A and for Aggressive Driving, SFCC 1987, Section 12-6-12.4A, shall be allocated, fifty percent (50%) to the Law Enforcement Fund and fifty percent (50%) to the Fire Support Services Fund, with the exception of fines collected for speeding, which are allocated to the Traffic Calming Program as described in Section 4 above.</u>

SECTION [~~5~~] <u>6</u>. MUNICIPAL COURT FEES.

In addition to the penalty assessment established pursuant to this Exhibit, there shall be assessed the municipal court fees for each penalty assessment petty misdemeanor as set forth in Section 1-3.2 SFCC 1987.

SECTION [~~6~~] 7. PENALTY ASSESSMENT PETTY MISDEMEANORS; OPTION; EFFECT.

A. Unless a warning notice is given, at the time of making an arrest for any penalty assessment petty misdemeanor, the arresting officer shall offer the alleged violator the option of accepting a penalty assessment. The violator's signature on the penalty assessment notice constitutes an acknowledgement of guilt of the offense stated in the notice, and payment of the prescribed penalty assessment is a complete satisfaction of the violation.

B. Payment of any penalty assessment shall be made by mail to the Municipal Court, City of Santa Fe, P.O. Box 909, Santa Fe, New Mexico, 87504-0909 within 30 days from the date of arrest. Payments of penalty assessments are timely if postmarked within the time limits set from the date of arrest. The Municipal Court shall issue a receipt when a penalty assessment is paid by currency, but a check or money order tendered by the violator upon which payment is received is sufficient receipt.

C. No record of any penalty assessment payment is admissible as evidence in any court in any civil action.

SECTION [~~7~~] 8. FAILURE TO PAY PENALTY ASSESSMENT.

A. If a penalty assessment is not paid within 30 days from the date of arrest, the violator shall be prosecuted for the violation charged on the penalty assessment notice in a manner as if the penalty assessment notice had not been issued. Upon conviction in such prosecution, the court shall impose penalties as provided for by the New Mexico Uniform Traffic Ordinance (Section 12-12-1.1), or other law relating to motor vehicles for the particular offense charge, and the scheduled penalty assessment shall not apply.

B. In addition to the prosecution provided for in Section A above, it is a petty misdemeanor for any person who has elected to pay a penalty assessment to fail to do so within 30 days from the date of arrest.

C. The municipal court shall not notify the motor vehicle division of the state of New Mexico when a person fails to pay a penalty assessment within the required period of time.

SECTION [~~8~~] 9. VIOLATIONS NOT LISTED ON PENALTY ASSESSMENT SCHEDULE. This traffic violation penalty assessment schedule does not apply to traffic violations not listed above which are petty misdemeanors. Such violations mandate a court appearance with a fine of up to three hundred dollars ($300.00) and up to 90 days in jail.

PASSED, APPROVED, and ADOPTED this _____day of _____, 2026.

APPROVED AS TO FORM:

Marcos D. Martinez
Marcos D. Martinez (Apr 24, 2026 14:48:05 MDT)

MARCOS D. MARTÍNEZ, CITY ATTORNEY

Legislation/2026/Bill/2026-9(B)/Defining Aggressive Driving

FIR No. 10615.0

FISCAL IMPACT REPORT

General Information:

(Check) **Bill:** x **Resolution:** _____

Short Title(s): Defining Aggressive Driving and Establishing Penalties

Sponsor(s): Councilor Pilar Faulkner, Councilor Amanda Chavez, and Councilor Lee Garcia

Reviewing Department(s): Finance Department, City Attorney's Office, Police Department, Fire Department

Staff Completing FIR: Ben Valdez, Deputy Chief of Police

Date: 4/16/2026 **Phone:** (505) 955-5040

Reviewed by City Attorney: Marcos D. Martinez Marcos D. Martinez (Apr 24, 2026 14:48:05 MDT) **Date:** 04/24/2026

Reviewed by Finance Director: ANDREA PHILLIPS (Apr 24, 2026 14:50:43 MDT) **Date:** 04/24/2026

Summary:

The adoption of this bill would create a new subsection of Article VI of the Uniform Traffic Ordinance ("UTO"), Exhibit A of Chapter 24 of SFCC 1987 to define, criminalize, and penalize "aggressive driving". It specifies that every person convicted of aggressive driving shall be required to comply with a mandatory court appearance and be punished as follows:

1) Upon a first conviction by fine of two hundred and fifty dollars ($250);
2) Upon a second conviction, by imprisonment for seven days, and by a fine of five hundred dollars ($500);
3) Upon a third conviction, by imprisonment for fourteen days and a fine of five hundred dollars ($500);
4) Upon subsequent convictions, imprisonment for ninety days and a fine of five hundred dollars ($500).

The bill includes a provision specifying that the court shall permit people who are convicted of aggressive driving and who are determined to be indigent to perform community service in lieu of payment of fines; however, this does not prevent the court from sentencing the person to jail, if applicable.

Additionally, the bill amends Article VI of the UTO, Subsection 12-6-12.3, SFCC 1987, "Reckless Driving," to accomplish the following changes to the reckless driving fines:

1) Eliminates the concept of minimum penalties;
2) Upon first conviction, raises the maximum penalty from twenty-five dollars ($25) to two hundred and fifty dollars ($250);
3) Upon second conviction, raises the maximum penalty from three hundred dollars ($300) to five hundred dollars ($500).

Lastly, the bill creates a section in the UTO called the "Police and Fire Resiliency Funds". Upon adoption of the ordinance, and in compliance with Section 2-2.4, SFCC 1987, all fines collected for violations of the UTO, Schedule A, for aggressive driving, and for reckless driving shall be allocated fifty percent (50%) to the Law Enforcement Fund and fifty (50%) to the Fire Support Services Fund, with the exception of fines

collected for speeding (which are allocated toward the Traffic Calming Program).

Departments Affected:
City of Santa Fe's Police Department, Fire Department, and Finance Department

Consequences of Not Enacting Legislation:
If this legislation is not adopted, aggressive driving will not be defined as a punishable offense in the City of Santa Fe's Municipal Code, nor will the fines for reckless driving, aggressive driving, and all fines listed on Schedule A of the UTO be allocated to the Law Enforcement Fund and the Fire Services Support Fund.

Performance and Administrative Implications:
The Police Department will maintain statistics for the number of violations for aggressive driving when a citation is issued, including the underlying offenses that make the incident rise to the level of aggressive driving. The statistics will be presented annually in the Traffic Unit's portion of the Police Department's Annual Report. The Police Department will also conduct enforcement and education to improve the safety of our roads to make drivers aware of the consequences of aggressive driving.

Fiscal Implications:
***The fees generated from the UTO's Schedule A in fiscal year 2025 totaled approximately $124,000. If we continue this trend, we can anticipate a similar collection rate in funds from Schedule A, absent any significant changes. With the implementation of the Ordinance, the City may see a small increase in revenue associated with aggressive driving violations. On a fund level, the General Fund would see a small decrease in revenue due to the reallocation of fine revenue to the Law Enforcement and Fire Support Services Funds, both of which would see a positive impact respectively due to the collection of fees from Schedule A, fees from reckless driving, as well as fees collected from aggressive driving fines.

Fiscal Impact

_____ Check here if no fiscal impact

Expenditures

Expenditure Type	FYE __	FYE __	FYE __	Require BAR (Y/N)	Recurring (R) or Non-recurring (NR)	Fund	3-Year Total Cost
Personnel and Benefits*	$	$	$				
Capital Outlay	$	$	$				
Contractual/ Professional Services	$	$	$				
Operating	$	$	$				$
Total:	$	$	$				$

* This includes all staff time associated with executing the job functions of the proposed legislation.

Expenditure Narrative:

Revenue

Revenue Type	FYE __	FYE __	FYE __	Recurring (R) or Non-recurring (NR)	Fund
General Fund	$	$	$		
Special Revenue	$	$	$		
CIP	$	$	$		
Enterprise	$	$	$		
Internal Service	$	$	$		
Trust and Agency	$	$	$		
Federal	$	$	$		
Other	$	$	$		
Total	$	$	$		

Revenue Narrative:

***See "Fiscal Implications" narrative above.

Signature:

Email: tjgrundler@santafenm.gov

Signature:

Email: bpvaldez@santafenm.gov

CITY OF SANTA FE, NEW MEXICO

PROPOSED AMENDMENT(S) TO BILL NO. 2026-9

Defining Aggressive Driving and Establishing Penalties

Mayor and Members of the City Council:

In relation to Bill No. 2026-9.

This amendment WILL change the caption. _____

This amendment WILL NOT change the caption. ___X__

I intend to propose the following amendment(s),

CITY OF SANTA FE, NEW MEXICO

BILL NO. 2026-9

INTRODUCED BY:

Councilor Pilar Faulkner

Councilor Lee Garcia

Councilor Amanda Chavez

AMENDMENT A – RED - Councilor Feghali

A BILL

AMENDING SUBSECTION 12-6-12.3 OF ARTICLE VI OF THE UNIFORM TRAFFIC ORDINANCE ("UTO") TO ELIMINATE MINIMUM PENALTIES FOR RECKLESS

underscored material = new [~~bracketed material~~] = delete

DRIVING AND RAISING MAXIMUM PENALTIES FROM TWENTY-FIVE DOLLARS ($25) TO TWO HUNDRED AND FIFTY DOLLARS ($250) FOR FIRST CONVICTIONS AND FROM THREE HUNDRED DOLLARS ($300) TO FIVE HUNDRED DOLLARS ($500) FOR SECOND OR SUBSEQUENT CONVICTIONS; CREATING A NEW SUBSECTION 12-6-12.4A OF ARTICLE VI OF THE UTO, EXHIBIT A TO CHAPTER 24, SFCC 1987 TO DEFINE, CRIMINALIZE, AND PENALIZE "AGGRESSIVE DRIVING"; AMENDING THE UTO'S SCHEDULE A TRAFFIC VIOLATION PENALTY ASSESSMENT SCHEDULE TO INCREASE CERTAIN PENALTIES, TO SPECIFY THAT ALL RECKLESS DRIVING FINES, AGGRESSIVE DRIVING FINES, AS WELL AS ALL SCHEDULE A PENALTIES (EXCEPT FOR THOSE DEDICATED TO TRAFFIC CALMING) SHALL BE SPLIT EQUALLY BETWEEN THE LAW ENFORCEMENT FUND AND THE FIRE SUPPORT SERVICES FUND, AND TO REQUIRE A MANDATORY COURT APPEARANCE FOR VIOLATIONS RELATED TO AGGRESSIVE DRIVING; CREATING A NEW SUBSECTION 12-6-12.25 OF ARTICLE VI "ENGAGING IN PROLONGED, DELIBERATE, AND/OR EXCESSIVE TAILING OF ANOTHER VEHICLE" AND ESTABLISHING A PENALTY IN SANTA FE'S UTO, SCHEDULE A, TRAFFIC VIOLATION PENALTY ASSESSMENT SCHEDULE FOR THE SAME; CREATING A NEW SUBSECTION 12-6-12.26 OF ARTICLE VI "UNSAFE SUDDEN STOPS" AND ESTABLISHING A PENALTY IN SANTA FE'S UTO, SCHEDULE A, TRAFFIC VIOLATION PENALTY ASSESSMENT SCHEDULE FOR THE SAME; CREATING A NEW SUBSECTION 12-6-12.27 OF ARTICLE VI "THROWING ITEMS OUTSIDE OF VEHICLE AT ANOTHER VEHICLE OR AT A PEDESTRIAN" AND ESTABLISHING A PENALTY IN SANTA FE'S UTO, SCHEDULE A, TRAFFIC VIOLATION PENALTY ASSESSMENT SCHEDULE FOR THE SAME.

BE IT ORDAINED BY THE GOVERNING BODY OF THE CITY OF SANTA FE:

Section 1. Section 12-6-12.3 of the Uniform Traffic Ordinance, Exhibit A, Section 24, of SFCC 1987 (being Ordinance No. 2011-25, § 5) is hereby amended to read:

12-6-12.3 – Reckless Driving.

A. Any person who drives any vehicle carelessly and heedlessly in willful or wanton disregard of the rights or safety of others and without due caution and circumspection and at a speed or in a manner so as to endanger or be likely to endanger any person or property is guilty of reckless driving.

B. A person operating a motor vehicle shall not endanger a bicyclist.

C. Every person convicted of reckless driving shall be punished:

1) Upon a first conviction by imprisonment for not less than five days nor more than ninety days, or by a fine of [~~not less than twenty-five dollars ($25.00) nor more than one hundred dollars ($100.00~~] $250.00), or both; and

2) On a second or subsequent conviction by imprisonment for not less than ten days nor more than ninety days, or by a fine of [~~not less than fifty dollars ($50.00) nor more than three hundred dollars ($300.00~~] ($500), or both. (66-8-113 NMSA, 1978)

3) All fines collected for reckless driving shall be allocated fifty percent (50%) to the Law Enforcement Fund and fifty percent (50%) to the Fire Support Services.

Section 2. [NEW MATERIAL] A new Section 12-6-12.4A of the Uniform Traffic Ordinance, Exhibit A, Section 24, of SFCC 1987 is hereby ordained to read:

12-6-12.4A - AGGRESSIVE DRIVING.

A. Any person who during the course of conduct operates a vehicle in a manner that endangers or is likely to endanger people or property is guilty of aggressive driving if during the course of conduct, the person commits two or more of the following violations:

(1) Failure to obey traffic-control devices, Section 12-5-3;

(2) Failure to comply with rules to safely overtake a vehicle on the left as described in Sections 12-6-2.3, 12-6-2.4, and 12-6-2.5;

(3) Failure to drive on streets laned for traffic as described in Section 12-6-2.12;

(4) Following too closely, Section 12-6-2.13;

(5) Failure to yield right of way, Section 12-6-4;

(6) Engaging in prohibited activities while driving, Section 12-6-12.18;

(7) Racing on streets, Section 12-6-12.19;

(8) Engaging in prolonged, deliberate, or excessive tailing of another vehicle, Section 12-6-12.25;

(9) Unsafe sudden stops, Section 12-6-12.26; and/or

(10) Throwing items outside of vehicle at another vehicle or at any pedestrian, bicyclist, or other person using the roadway, Section 12-6-12.27.

B. For the purposes of this section, "course of conduct" means a series of acts committed during a single, continuous period of driving.

C. Every person convicted of aggressive driving shall be required to comply with a mandatory court appearance and shall be punished as follows:

(1) Unless otherwise specified in Schedule A of the Uniform Traffic Ordinance, SFCC 1987, upon a first conviction by a fine of two hundred fifty dollars ($250);

(2) Upon a second conviction by imprisonment for seven days, and a fine of five hundred dollars ($500);

(3) Upon a third conviction by imprisonment for fourteen days and a fine of five hundred dollars ($500); and

(4) Upon subsequent convictions by imprisonment for ninety days and a fine of five hundred dollars ($500).

D. If the person convicted of aggressive driving is determined to be indigent, the court shall

permit the individual to perform community service in lieu of payment of fines; however, this does not prevent the court from sentencing the person to jail, if applicable.

E. All fines collected for reckless driving shall be allocated fifty percent (50%) to the Law Enforcement Fund and fifty percent (50%) to the Fire Support Services.

Section 3. [NEW MATERIAL] A new Subsection 12-6-12.25 of Article VI of the Uniform Traffic Ordinance, Exhibit A, Chapter 24 of SFCC 1987 is hereby ordained to read:

12-6-12.25 – ENGAGING IN PROLONGED, DELIBERATE, AND/OR EXCESSIVE TAILING OF ANOTHER VEHICLE.

No person shall change their route, direction, or course of travel in order to aggressively follow another vehicle such that the following is prolonged, excessive, and/or deliberate.

Section 4. [NEW MATERIAL] A new Section 12-6-12.26 of Article VI of the Uniform Traffic Ordinance, Exhibit A, Chapter 24 of SFCC 1987 is hereby ordained to read:

12-6-12.26 – UNSAFE SUDDEN STOPS.

No person shall suddenly apply their brakes while another driver is following in a manner that unnecessarily impedes or obstructs the normal and reasonable flow of traffic, except when the stop is required for safe operation of the vehicle or to comply with the law.

Section 5. [NEW MATERIAL] A new Section 12-6-12.27 of Article VI the Uniform Traffic Ordinance, Exhibit A, Chapter 24 of SFCC 1987 is hereby ordained to read:

12-6-12.27 – THROWING ITEMS OUTSIDE OF VEHICLE AT ANOTHER VEHICLE OR AT A PEDESTRIAN.

No person shall throw, toss, or otherwise project any object or substance from a vehicle, whether the vehicle is moving or stopped, at another vehicle or at any pedestrian, bicyclist, or other person using the roadway.

Section 6. Schedule A of Exhibit A of Chapter 24 (Uniform Traffic Ordinance) of SFCC 1987 (being Ordinance No. 2025-6 as amended) is amended to read:

SECTION 1.

This Exhibit may be cited as the city of Santa Fe traffic violation penalty assessment schedule for violations of the city of Santa Fe Uniform Traffic Code except those violations relating to parking which are set forth as Exhibit B of the city of Santa Fe Uniform Traffic Code.

SECTION 2.

"Penalty assessment petty misdemeanor" means violation of the following listed sections of the city of Santa Fe Uniform Traffic Code for which the listed penalty assessment is established. The term "penalty assessment petty misdemeanor" does not include any violation which has caused or contributed to the cause of an accident resulting in injury or death to any person. When an alleged violator of a penalty assessment petty misdemeanor elects to accept a notice to appear in lieu of a notice of penalty assessment, the fine imposed upon later conviction shall not exceed the penalty assessment established for the particular penalty assessment petty misdemeanor and probation imposed upon a suspended or deferred sentence may include community service as contemplated in Section 1-3.1 and shall not exceed ninety days.

COMMON NAME OF OFFENSE	**SECTION VIOLATED**	**PENALTY ASSESSMENT**
Obedience [~~T~~]to Traffic-Control Devices/Failure [~~T~~]to Stop	12-5-3	$25.00
Red Light	12-5-6	$25.00
Pedestrian Controls	12-5-7	$25.00
Flashing Signals	12-5-8	$25.00
Display of Unauthorized Signs, Signals, or Markings	12-5-10	$25.00
Basic (Speeding) Rule	12-6-1.1	$25.00
Speed Limits	12-6-1.2	

A. The following apply outside a school zone:		
Up to and including 10 miles an hour over speed limit		$15.00
From 11 up to and including 15 miles an hour over speed limit		$30.00
From 16 up to and including 20 miles an hour over speed limit		$65.00
From 21 up to and including 25 miles an hour over speed limit		$100.00
From 26 up to and including 30 miles an hour over the speed limit		$125.00
From 31 up to and including 35 miles an hour over the speed limit		$150.00
More than 35 miles an hour over the speed limit		$200.00
B. In a school zone	12-6-1.2A	$171.00
C. In a construction zone: The penalty assessment for speeding in violation of Section 12-6-1.2 (4) of the city of Santa Fe traffic ordinance is twice the penalty assessment established in subsection A above for the equivalent miles per hour over the speed limit		
D. In a pedestrian zone. The penalty assessment for speeding in violation of the posted speed limit in a designated pedestrian zone is twice the penalty assessment established in subsection A above for the equivalent miles per hour over the speed limit.		
Minimum Speed Regulations	12-6-1.5	$25.00
Driving [~~O~~]on Right Side [~~O~~]of Street	12-6-2.1	$25.00
Overtaking [~~A~~]a Vehicle [~~O~~]on [~~T~~]the Left	12-6-2.3	$25.00
Limitations [~~O~~]on Overtaking [~~O~~]on [~~T~~]the Left	12-6-2.4	$25.00
Overtaking [~~A~~]a Vehicle [~~O~~]on [~~T~~]the Right	12-6-2.6	$25.00
No Passing Zones/Restrictions [~~O~~]on Passing	12-6-2.7	$25.00
Streets Laned [~~F~~]for Traffic	12-6-2.12	$25.00

Following [~~T~~]too Closely	12-6-2.13	$25.00
Driving [~~O~~]on Divided Streets	12-6-2.14	$25.00
Driving Vehicle [~~O~~]on [~~O~~]or Across Bicycle Lane [~~O~~]or Path	12-6-2.17	$25.00
Turning Left [~~A~~]at Intersection	12-6-4.2	$25.00
Entering Stop/Yield Intersection/Failure [~~T~~]to Yield	12-6-4.3	$25.00
Required Position/Method of Turning/Improper Turn	12-6-5.1	$25.00
Obedience [~~T~~]to No-Turn Signs	12-6-5.4	$25.00
Limitations [~~O~~]on Turning Around/Illegal U-Turn	12-6-5.5	$25.00
Starting [~~A~~]a Parked Vehicle	12-6-5.7	$25.00
Turn/Stop Movements	12-6-5.8	$25.00
Failure [~~T~~]to Signal	12-6-5.9	$25.00
Motorist Turning Across Bicycle Lane	12-6-5.11	$25.00
Stopping, Standing & Parking	12-6-6	See Exhibit B
Special Stops Required	12-6-7 (Excluding 12-6-7.3, 12-6-7.4, 12-6-7.5 and 12-6-7.7)	$25.00
Stopping [~~F~~]for School Bus	12-6-7.3	$100.00
Failure [~~T~~]to Stop [~~A~~]at Railroad Crossing	12-6-7.5 and 12-6-7.7	$150.00
Operators and Chauffeurs Must Be Licensed	12-6-12.5	$25.00
Driving While License Suspended/Administratively Suspended	12-6-12.6 and 12-6-12.6A	$25.00
Driving While License Revoked	12-6-12.6B	$300-$500
Unattended Motor Vehicle	12-6-12.8	$25.00
Limitations [~~O~~]on Backing	12-6-12.9	$25.00

Restriction [~~O~~]on Use of Video [~~I~~]in Motor Vehicles	12-6-12.11	$25.00
Coasting Prohibited	12-6-12.12	$25.00
Prohibited Activities While Driving (including hand held mobile communication device use)	12-6-12.18	$200.00
Mobile communication device use while driving in a school zone	12-6-12.18	$300.00
For subsequent violation		$500
Permitting Unauthorized Persons [~~T~~]to Drive	12-6-12.23	$25.00
Prolonged, deliberate, or excessive tailing of another vehicle	12-6-12.25	$250
for subsequent violations		$500
Unsafe, Sudden Stops, 1st offense	12-6-12.26	$250
for subsequent violations		$500
Throwing Items Outside of Vehicle at Another Vehicle or at a Pedestrian, 1st offense	12-6-12.27	$250
for subsequent violations		$500
Destructive Material [~~O~~]on Roadway/Failure [~~T~~]to Secure Load	12-6-13.5	$100.00
Improper Opening [~~O~~]of Doors	12-6-13.8	$25.00
Child Restraint Device [~~O~~]or Safety Belt	12-6-13.12	$100.00
Mandatory Use [~~O~~]of Seat Belts	12-6-13.13	$100.00
Open Container, 1st Offense	12-6-13.14	$100.00
for subsequent violations		mandatory court appearance
Jaywalking	12-6 13.15 through 12-6-14.8	$25.00
Littering	12-6-13.15	$300.00
Unsafe Median Use	12-6-14.9	$25.00

Windshield	12-10-1.12	$25.00
When Lighted Lamps [~~A~~]are Required	12-10-1.3	$25.00
Headlamps [~~O~~]on Vehicles	12-10-1.5	$25.00
Dimming [~~O~~]of Lights	12-10-1.6	$25.00
Tail Lamps	12-10-1.7, except 12-10-1.7C	$25.00
Plate Light Required	12-10-1.7C.	$10.00
Stop Lamps/Brake Lamps	12-10-1.9	$25.00
Mufflers, Prevention [~~O~~]of Noise	12-10-1.10	$500.00
Lamp or Flag on Projecting Load	12-10-1.11	$25.00
Windshield Must be Unobstructed and Equipped with Wipers and Windows Must be Transparent	12-10-1.12	$25.00
Tinted Windows	12-10-1.12A	$25.00
Unsafe Equipment (Brakes)	12-10-1.16	$25.00
Display of Current Valid Registration Plate	12-10-4	$25.00

SECTION 3. MANDATORY COURT APPEARANCES.

Violations of the following listed sections of the city of Santa Fe Uniform Traffic Code require a mandatory court appearance:

Leaving the Scene of an Accident	12-4-2
Failure to Render Aid/Duty to Give Info	12-4-3
Immediate Notice of Accident	12-4-6
Failure to Yield to Emergency Vehicle	12-6-7.4
Reckless Driving	12-6-12.3

Careless Driving/Driver Inattention	12-6-12.4
Aggressive Driving	12-6-12.4A
Operator/Chauffeur Licenses Required	12-6-12.5
Unlawful Use of License (Revoked)	12-6-12.6
Unlawful Use of License (Suspended)	12-6-12.6
Fleeing or Attempting to Elude an Officer	12-6-12.7
Racing on Streets/Drag Racing/Exhibition of Speed	12-6-12.19
Open Container 2 nd , 3 rd , etc.	12-6-13.14
Off-Highway Motor Vehicles (ATV)	12-7-9 through 12-7-9.6
Display of Current Registration	12-10-4
Evidence of Registration	12-10-5
Mandatory Financial Responsibility (Insurance)	12-10-6

SECTION 4. TRAFFIC CALMING FEES.

A. Persons violating speed limits within the city have created a need for traffic calming. The governing body has determined that those persons violating the speed limits should pay additional fees. The purpose of the additional fees is to discourage speeding within the city and to provide funds for the city's traffic calming program.

B. The city hereby imposes a traffic calming fee equal to the maximum fine (excluding court fees) to be paid by any person convicted of a speeding violation as set forth in the Uniform Traffic Ordinance as adopted by the city, the total of which shall not exceed the jurisdictional limits of the court. The traffic calming fee applies to all violations of Section 12-6-1.2, but the traffic calming fee is not doubled.

C. The traffic calming fee shall be collected by the municipal court for funding the city's traffic calming program. The amount of fees collected shall not decrease the amount of money

allocated to the traffic calming program through the current fiscal year Capital Improvement Program bonding process.

D. The governing body shall review the results of this subsection including the amount of fees which have been collected and the amount of police overtime because of this subsection. The municipal court shall provide the governing body with the appropriate statistics to review this subsection.

SECTION 5. POLICE AND FIRE RESILIENCY FUNDS

Consistent with NMSA 1978, sec. 35-15-12, all fees collected for violations of the city of Santa Fe's Uniform Traffic Ordinance, Schedule A and for Aggressive Driving, SFCC 1987, Section 12-6-12.4A, shall be allocated, fifty percent (50%) to the Law Enforcement Fund and fifty percent (50%) to the Fire Support Services Fund, with the exception of fines collected for speeding, which are allocated to the Traffic Calming Program as described in Section 4 above.

SECTION [~~5~~] 6. MUNICIPAL COURT FEES.

In addition to the penalty assessment established pursuant to this Exhibit, there shall be assessed the municipal court fees for each penalty assessment petty misdemeanor as set forth in Section 1-3.2 SFCC 1987.

SECTION [~~6~~] 7. PENALTY ASSESSMENT PETTY MISDEMEANORS; OPTION; EFFECT.

A. Unless a warning notice is given, at the time of making an arrest for any penalty assessment petty misdemeanor, the arresting officer shall offer the alleged violator the option of accepting a penalty assessment. The violator's signature on the penalty assessment notice constitutes an acknowledgement of guilt of the offense stated in the notice, and payment of the prescribed penalty assessment is a complete satisfaction of the violation.

B. Payment of any penalty assessment shall be made by mail to the Municipal Court, City of Santa Fe, P.O. Box 909, Santa Fe, New Mexico, 87504-0909 within 30 days from the date

of arrest. Payments of penalty assessments are timely if postmarked within the time limits set from the date of arrest. The Municipal Court shall issue a receipt when a penalty assessment is paid by currency, but a check or money order tendered by the violator upon which payment is received is sufficient receipt.

C. No record of any penalty assessment payment is admissible as evidence in any court in any civil action.

SECTION [~~7~~] 8. FAILURE TO PAY PENALTY ASSESSMENT.

A. If a penalty assessment is not paid within 30 days from the date of arrest, the violator shall be prosecuted for the violation charged on the penalty assessment notice in a manner as if the penalty assessment notice had not been issued. Upon conviction in such prosecution, the court shall impose penalties as provided for by the New Mexico Uniform Traffic Ordinance (Section 12-12-1.1), or other law relating to motor vehicles for the particular offense charge, and the scheduled penalty assessment shall not apply.

B. In addition to the prosecution provided for in Section A above, it is a petty misdemeanor for any person who has elected to pay a penalty assessment to fail to do so within 30 days from the date of arrest.

C. The municipal court shall not notify the motor vehicle division of the state of New Mexico when a person fails to pay a penalty assessment within the required period of time.

SECTION [~~8~~] 9. VIOLATIONS NOT LISTED ON PENALTY ASSESSMENT SCHEDULE. This traffic violation penalty assessment schedule does not apply to traffic violations not listed above which are petty misdemeanors. Such violations mandate a court appearance with a fine of up to three hundred dollars ($300.00) and up to 90 days in jail.

Respectfully submitted,

Patricia Feghali

PATRICIA FEGHALI , COUNCILOR

APPROVED AS TO FORM:

Marcos D. Martinez

Marcos D. Martinez (May 15, 2026 14:38:24 MDT)

MARCOS D. MARTÍNEZ, CITY ATTORNEY

ADOPTED: _____

NOT ADOPTED: _____

DATE:_____

ATTEST:

_____

GERALYN F. CARDENAS, CITY CLERK

Legislation/2026/Bill/2026-9(B)/Amendment A/Defining Aggressive Driving

CITY OF SANTA FE

Date: May 4, 2026

To: Governing Body

Via: JOHN BURNETT (May 15, 2026 10:09:34 MDT)
Sam Burnett, Interim Public Works Department Director
Marcos Esquibel, Interim Complete Streets Division Director MARCOS ESQUIBEL
Carol Swenson, Public Works Business Operations Manager YVONNE SWENSON (May 7, 2026 07:41:40 MDT)

From: Romella Glorioso-Moss, PhD, CPM, AICP, CPO, Capital Projects Manager RGM

ITEM AND ISSUE:
Request for Approval of a Memorandum of Agreement (MOA) Between the City of Santa Fe and Santa Fe County Designating the City as Lead Agency for Funding Applications, Project Administration, and Construction of the Henry Lynch Road Reconstruction and Roundabout Project, Including Portions Within County Jurisdiction. (Romella Glorioso-Moss, Complete Streets Capital Projects Manager, rsglorioso-moss@santafenm.gov)

BACKGROUND AND SUMMARY:
The attached MOA establishes that, in the best interest of the City, County, and public, the City of Santa Fe will assume responsibility for funding applications, project administration, and construction of improvements along the full length of Henry Lynch Road, including segments within Santa Fe County.

The project was initiated five years ago with State funding and is nearing completion of the design phase. Engineering design has been led by the City in coordination with the County under an existing agreement.

Additional design funding is required due to an expanded scope, including the addition of stormwater drainage infrastructure designed to convey a 100-year storm event. This change required updated survey work and engineering certifications.

The total estimated construction cost is $15 million and will be delivered in two phases:

- Phase A ($7 million): Reconstruction of Henry Lynch Road from La Paz Road to Agua Fría Street, including construction of a roundabout at Agua Fría Street.
- Phase B ($8 million): Reconstruction from Rufina Street to La Paz Road, including stormwater drainage improvements to address flooding in the La Paz neighborhood.

The project will reconstruct approximately 0.5 miles of Henry Lynch Road between Agua Fría Street and Rufina Street as a safer, more resilient, multimodal corridor. As a key north-south collector, the roadway provides critical connectivity to surrounding neighborhoods, employment centers, and essential services, with direct access to Agua Fría Street and regional routes including Interstate 25 and NM 599.

Improvements are designed in accordance with Complete Streets principles and include on-road grade-separated bicycle lanes (the first in the City and County), ADA-compliant sidewalks, 10-foot travel lanes, raised median, a roundabout, stormwater infrastructure designed to accommodate a 100-year storm event, curb and gutter, and street landscaping. These enhancements will improve traffic operations and significantly reduce the risk of severe and fatal crashes.

Committee Review:
Public Works and Utilities Committee: 05/18/2026
Finance Committee: 05/26/2026
Governing Body: 05/27/2026

MEMORANDUM OF AGREEMENT
BETWEEN SANTA FE COUNTY AND THE CITY OF SANTA FE
REGARDING THE CONSTRUCTION OF IMPROVEMENTS TO HENRY LYNCH ROAD

THIS MEMORANDUM OF AGREEMENT ("MOA") is entered into this 28th day of April, 2026, between **Santa Fe County** ("County"), a political subdivision of the State of New Mexico, and the **City of Santa Fe** ("City"), a charter municipality of the State of New Mexico.

RECITALS

WHEREAS, in the spirit of cooperation, mutual respect, and service to the residents of the County and the City, this MOA confirms the parties' commitment to mutual cooperation recognizing that coordinated activities between governmental entities may produce community and constituency benefits beyond what might be produced independently; and

WHEREAS, this MOA is exempt from the Procurement Code pursuant to Section 13-1-98(A), NMSA 1978, as an agreement between governmental entities; and

WHEREAS, the parties agree that the improvements described in this MOA are of mutual interest and benefit to the County and the City; and

WHEREAS, Henry Lynch Road lies within the boundary of City of Santa Fe and extends into the County limits of the County of Santa Fe; and

WHEREAS, the parties agree that it is in the best interest of the County, the City, and the public that the City assume responsibility for funding applications, project administration, and construction of improvements to the entirety of Henry Lynch Road, including the portion located within Santa Fe County; and

WHEREAS, the City of Santa Fe has adopted a resolution authorizing the City to apply for state and funding for the construction of Henry Lynch Road Project; and

WHEREAS, the estimated total cost for the construction of the Henry Lynch Road Project is approximately Fifteen Million Dollars ($15,000,000); and

WHEREAS, the City intends to pursue funding through transportation programs including but not limited to the Local Government Road Fund (LGRF), the Municipal Arterial Program (MAP), the Transportation Project Fund (TPF), and other state funding sources, each of which may require a local match ranging from five percent (5%) to twenty-five percent (25%) depending on the funding source; and

WHEREAS, the County intends to pursue funding through the Transportation Project Fund (TPF), which requires a local match ranging of five percent (5%).

SFC CLERK RECORDED 05/01/2026

NOW, THEREFORE, the parties agree as follows:

1. SCOPE OF AGREEMENT

The Project consists of the construction and improvement of Henry Lynch Road from Rufina Street to Agua Fria Road, including but not limited to:

- Roadway reconstruction and paving
- Roundabout
- Bicycle lanes
- ADA-compliant sidewalks
- Curb and gutter
- Drainage improvements
- Traffic control devices
- Related transportation infrastructure improvements (collectively, the "Project").

The City shall serve as the lead agency for the Project and shall:

- Apply for and administer funding from state, county and city sources;
- Procure engineering, construction, and related services;
- Administer and manage construction contracts;
- Ensure compliance with applicable city, county and state requirements; and
- Coordinate project construction across both City and County jurisdictions.

The County authorizes the City to construct improvements along the entirety of Henry Lynch Road, including the portion located within Santa Fe County.

The County agrees to cooperate with the City in matters related to:

- funding applications;
- project review and coordination;
- right-of-way access;
- permitting and regulatory compliance; and
- public outreach and coordination with residents.

2. PROJECT FUNDING

The estimated construction cost for the Project is $15,000,000.

The City will pursue funding through transportation programs including but not limited to:

- Local Government Road Fund (LGRF);
- Municipal Arterial Program (MAP);
- Transportation Project Fund (TPF); and
- Legislative appropriations or other state funding opportunities

Local match requirements associated with these funding sources may range from five percent (5%) to twenty-five percent (25%), depending on the specific program requirements.

SFC CLERK RECORDED 05/01/2026

The County will pursue funding through TPF. The local match requirements associated with this funding source is five percent (5%).

The parties agree that funding responsibilities shall be allocated according to each jurisdiction as follows:

County Jurisdiction Segment
For the portion of Henry Lynch Road located within Santa Fe County jurisdiction, the County shall be responsible for:

- Providing any required local match associated with grants or transportation funding programs, and
- Securing and providing legislative appropriations requested through the County's Infrastructure Capital Improvement Plan (ICIP) process, including funding that may be awarded during future legislative sessions such as the 2028 New Mexico Legislative Session.

City Jurisdiction Segment
For the portion of Henry Lynch Road located within City of Santa Fe jurisdiction, the City shall be responsible for:

- Providing any required local match associated with grants or transportation funding programs, and
- Securing and administering any additional funding necessary for improvements within City limits.

The City, as lead agency, shall coordinate closely with the County regarding funding applications, project budgeting, and reporting requirements associated with grant or legislative funding received for the Project. The City shall not commit the County to any financial obligation without the County's prior written approval.

The parties acknowledge that funding amounts, match requirements, and project scope may change depending on the specific grant agreements executed with funding agencies. No such changes shall increase the County's financial obligation without a written amendment approved by the County.

3. PHASED PROJECT IMPLEMENTATION

The Project may be implemented in multiple phases, depending on available funding sources.
Phases may include but are not limited to:

- Phase A from La Paz Lane to Agua Fria Street
- Phase B from Rufina to La Paz Lane

The City will coordinate project phasing with the County to ensure continuity of roadway operations and public safety.

4. RIGHT-OF-WAY COORDINATION

SFC CLERK RECORDED 05/01/2026

To the extent necessary for the Project:

- The County agrees to cooperate with the City regarding right-of-way access, easements, or temporary construction easements required for construction within County jurisdiction.
- Any acquisition of property interests shall be conducted in accordance with applicable state and federal laws including the Uniform Relocation Assistance and Real Property Acquisition Policies Act, 42 U.S.C. 4601 et seq, if applicable.

5. UTILITIES AND INFRASTRUCTURE COORDINATION

The City shall coordinate with all relevant utility providers for the relocation or protection of utilities affected by the Project.

Utility coordination may include, but is not limited to:

- water
- wastewater
- gas
- electric
- telecommunications
- stormwater infrastructure

The County will reasonably cooperate with the City and utility providers where County infrastructure is affected.

6. ENVIRONMENTAL AND REGULATORY COMPLIANCE

The City shall ensure compliance with all applicable state and federal environmental regulations, including but not limited to:

- National Environmental Policy Act (NEPA) if applicable
- NMDOT environmental requirements
- stormwater permitting requirements
- cultural and historic preservation requirements
- environmental clearances required by funding agencies.

The County agrees to cooperate with the City in providing information or documentation necessary to complete environmental review.

7. MAINTENANCE RESPONSIBILITY

Upon completion of construction:

- Each party shall remain responsible for the operation and maintenance of the roadway within its respective jurisdiction, unless otherwise agreed in writing.
- The City shall maintain the portion of Henry Lynch Road located within City limits.
- The County shall maintain the portion located within County jurisdiction.

SFC CLERK RECORDED 05/01/2026

The parties may negotiate a separate maintenance agreement in the future if operational efficiencies warrant shared maintenance responsibilities.

8. EFFECTIVE DATE AND TERM

This MOA shall become effective upon the date of the last signature and shall remain in effect for five (5) years, unless terminated earlier pursuant to this Agreement.

9. TERMINATION

If either party fails to fulfill its obligations under this MOA, the non-breaching party may terminate the Agreement by providing written notice specifying the cause and effective termination date.

10. ASSIGNMENT

The City shall not assign its responsibilities under this MOA without prior written approval of the County.

11. NO THIRD-PARTY BENEFICIARIES

This MOA does not create rights in any person or entity not a party to this Agreement.

12. LIABILITY

Neither party shall be responsible for liability incurred as a result of the other party's acts or omissions in connection with this Agreement. Liability shall be subject to the New Mexico Tort Claims Act, §41-4-1 et seq., NMSA 1978.

13. AMENDMENT

This MOA may only be amended by written agreement executed by both parties.

14. INTEGRATION CLAUSE

This MOA represents the entire agreement between the parties regarding the Project and supersedes prior agreements or understandings unless incorporated herein.

15. APPLICABLE LAW; VENUE

This Agreement shall be governed by the laws of the State of New Mexico, with venue in the First Judicial District Court, Santa Fe County.

16. APPROPRIATIONS AND AUTHORIZATIONS

Performance of this MOA is contingent upon sufficient appropriations and authorizations by the governing bodies of the parties, including:

SFC CLERK RECORDED 05/01/2026

- Governing Body of the City of Santa Fe
- Santa Fe County Board of County Commissioners
- New Mexico Department of Transportation or the New Mexico Legislature

If sufficient appropriations are not made, this MOA shall terminate without penalty upon written notice.

17. ELECTRONIC SIGNATURES

Electronic signatures shall have the same force and effect as original signatures.

18. RECORDS AND FINANCIAL AUDIT

To the extent records relate to the performance of this MOA or funding received, the City shall maintain books and records for six (6) years and permit audit upon reasonable notice.

19. NOTICES

Notices required by this MOA shall be provided in writing to:

CITY
Public Works Director
City of Santa Fe
200 Lincoln Street
Santa Fe, NM 87501
Notice shall be effective upon personal delivery or three business days after deposit with the U.S. Postal Service.

COUNTY
Public Works Director
Santa Fe County
424 NM 599 Frontage Road
Santa Fe, NM 87507

20. SURVIVAL

The following provisions shall survive termination of this MOA: Liability, Records and Financial Audit, Applicable Law, No Third-Party Beneficiaries, and Survival.

SIGNATURES

IN WITNESS WHEREOF, the parties have executed this Memorandum of Agreement as of the last date of signature below.

SFC CLERK RECORDED 05/01/2026

CITY OF SANTA FE

MICHAEL GARCIA, MAYOR
City of Santa Fe
Date: _____

ATTEST

_____
GERALYN CARDENAS, CITY CLERK

DATE: _____

CITY ATTORNEY'S OFFICE

Marcos D. Martinez
Marcos D. Martinez (Apr 6, 2026 15:51:05 MDT)
MARCOS MARTÍNEZ, CITY ATTORNEY

DATE: Apr 6, 2026

APPROVED FOR FINANCE

ANDREA PHILLIPS (May 15, 2026 16:39:06 MDT)
ANDREA PHILLIPS, INTERIM FINANCE DIRECTOR

DATE: 05/15/2026

SANTA FE COUNTY

CHAIR
Board of County Commissioners
Date: 4/28/26

SFC CLERK RECORDED 05/01/2026

APPROVED AS TO FORM

Peter Valencia for

WALKER BOYD
SANTA FE COUNTY ATTORNEY

DATE: 4/1/2026

SFC CLERK RECORDED 05/01/2026

GB_MOA_COSF_-_SFC_(Henry_Lynch_Rd) (1)

Final Audit Report 2026-05-15

Created:	2026-05-15
By:	ALYSSA PEREZ (aeperez@santafenm.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAAYyVrgjj2IxQ_0mOIrh20ikC3UgcYD_bu

"GB_MOA_COSF_-_SFC_(Henry_Lynch_Rd) (1)" History

Document created by ALYSSA PEREZ (aeperez@santafenm.gov)
2026-05-15 - 8:13:36 PM GMT- IP address: 50.228.218.220

Document emailed to ANDREA PHILLIPS (akphillips@santafenm.gov) for signature
2026-05-15 - 8:15:31 PM GMT

Document e-signed by ANDREA PHILLIPS (akphillips@santafenm.gov)
Signature Date: 2026-05-15 - 10:39:06 PM GMT - Time Source: server- IP address: 63.232.20.2 - Signature Appearance Selected: DRAW

Agreement completed.
2026-05-15 - 10:39:06 PM GMT

Powered by Adobe Acrobat Sign

CITY OF SANTA FE

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

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

AP
AP (May 22, 2026 13:27:39 MDT)

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.

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

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:

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) or Aron Kirsch (347-419-2191; 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.

WSP USA
2440 Louisiana Boulevard
NE Suite 400
Albuquerque, NM 87110
T+1 505-881-5357

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: Revised Work 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 10th 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
Assumed Fiscal Year 2026	**154**	**$25,804.00**
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
Assumed Fiscal Year 2027	**168**	**$29,561.00**
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
Total WSP hours and fee for this task	**322**	**$55,365.00**

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 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
Assumed Fiscal Year 2026	**332**	**$74,046.00**
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
Assumed Fiscal Year 2027	**430**	**$64,850.00**
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
Total WSP hours and fee for this task	**762**	**$138,896.00**

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
Assumed Fiscal Year 2026	**128**	**$24,262.00**
Digital User Platform implementation and enhancement	128	$24,262.00
Assumed Fiscal Year 2027	**108**	**$21,183.00**
Digital User Platform implementation and enhancement	108	$21,183.00
Total WSP hours and fee for this task	**236**	**$45,445.00**

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
Assumed Fiscal Year 2026	**186**	**$32,651.00**
Plan Charrette Working Session	18	$4,567.00
Administrative and Draft Plan Documents	168	$27,913.00
Direct Expenses		$171.00
Assumed Fiscal Year 2027	**100**	**$16,525.00**
Final Plan Document	100	$16,440.00
Direct Expenses		$85.00
Total WSP hours and fee for this task	**286**	**$49,176.00**

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
Assumed Fiscal Year 2027	**88**	**$16,980.00**
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
Assumed Fiscal Year 2027	**163**	**$30,817.00**
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.

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

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 NMGRT. 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
Original Contract Value	**$1,745,000.00**
Original Contract Value for Santa Fe General Plan Update, excluding NMGRT	$1,745,000.00
Estimated 8.1875% NMGRT	$142,872.00
Total, including estimated NMGRT	$1,887,872.00
Original Contract Value, with Economic Development Strategy	**$1,883,652.00**
Original Contract Value for Santa Fe General Plan Update, excluding NMGRT	$1,745,000.00
Contract Value for Economic Development Strategy	$138,652.00
Estimated 8.1875% NMGRT	$154,220.00
Total, including estimated NMGRT	$2,037,872.00
Original Contract Value, with Economic Development Strategy and this Amendment	**$2,483,652.00**
Original Contract Value for Santa Fe General Plan Update, excluding NMGRT	$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% NMGRT	$203,349.00
Total, including estimated NMGRT	$2,687,001.00

CITY OF SANTA FE

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

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 19th, 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: JoAnn Lovato Montaño **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).

PRODUCER
Arthur J. Gallagher Risk Management Services, LLC
300 Madison Avenue
28th Floor
New York NY 10017

CONTACT NAME: AJG Service Team
PHONE (A/C, No, Ext): 212-994-7020 **FAX (A/C, No):**
E-MAIL ADDRESS: GGB.WSPUS.CertRequests@ajg.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Liberty Insurance Corporation	42404
INSURER B : Zurich American Insurance Company	16535
INSURER C :	
INSURER D :	
INSURER E :	
INSURER F :	

INSURED WSPGLOB-01
WSP USA Inc.
One Penn Plaza
New York, NY 10119

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	X COMMERCIAL GENERAL LIABILITY	Y	Y	GLO9835819-12	5/1/2025	5/1/2026	EACH OCCURRENCE	$ 3,500,000
	CLAIMS-MADE X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 3,500,000
							MED EXP (Any one person)	$ 10,000
							PERSONAL & ADV INJURY	$ 3,500,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ 14,000,000
	X POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$ 7,000,000
	OTHER:							$
A	**AUTOMOBILE LIABILITY**			AS7-621-094060-035	5/1/2025	5/1/2026	COMBINED SINGLE LIMIT (Ea accident)	$ 5,000,000
	X ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	HIRED AUTOS ONLY / NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	UMBRELLA LIAB OCCUR						EACH OCCURRENCE	$
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	$
	DED RETENTION $							$
A A A	**WORKERS COMPENSATION AND EMPLOYERS' LIABILITY** Y / N	N / A		WA7-62D-094060-015	5/1/2025	5/1/2026	X PER STATUTE OTH-ER	
	ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? N **(Mandatory in NH)**			WA7-62D-095609-075	5/1/2025	5/1/2026	E.L. EACH ACCIDENT	$ 2,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below			WC7-621-094060-915	5/1/2025	5/1/2026	E.L. DISEASE - EA EMPLOYEE	$ 2,000,000
							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 Sante 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.

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

© 1988-2015 ACORD CORPORATION. All rights reserved.

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-Vison 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 briefer 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:

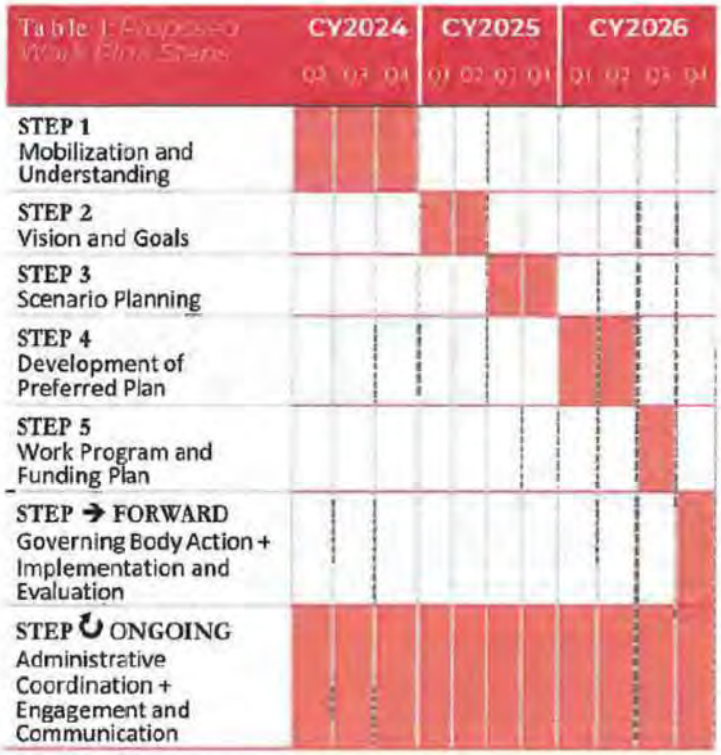


Table 1: Proposed Work Plan Steps	CY2024 Q1 Q2 Q3 Q4	CY2025 Q1 Q2 Q3 Q4	CY2026 Q1 Q2 Q3 Q4
STEP 1 Mobilization and Understanding			
STEP 2 Vision and Goals			
STEP 3 Scenario Planning			
STEP 4 Development of Preferred Plan			
STEP 5 Work Program and Funding Plan			
STEP → FORWARD Governing Body Action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

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

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

ALAN WEBBER, MAYOR

DATE: Dec 16, 2025

CONTRACTOR:
WSP USA INC.

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

MATT SIBUL, REGIONAL TRANSPORTATION LEAD

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:

Emily K. Oster

FINANCE DIRECTOR

LELAND CONSULTING GROUP

EXHIBIT C

610 SW Alder Street, Suite 1200
Portland, Oregon 97205

(503) 222-1600
info@lelandconsulting.com
lelandconsulting.com

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

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

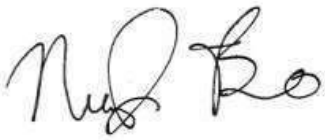
Dear Johanna,

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). 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
Labor		
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
Subtotal	**756**	**$128,541.00**
Direct Expenses (no mark-up)		
Mileage Reimbursement		$427.00
Travel expenses		$9,380.00
Vehicle charges		$300.00
Subtotal		**$138,648.00**
NMGRT @ 8.1875%		$11,352.00
Total		**$150,000.00**

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

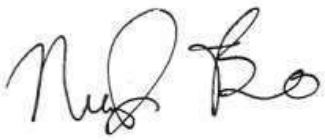
Dear Johanna,

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). 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
Labor		
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
Subtotal	**756**	**$128,541.00**
Direct Expenses (no mark-up)		
Mileage Reimbursement		$427.00
Travel expenses		$9,380.00
Vehicle charges		$300.00
Subtotal		**$138,648.00**
NMGRT @ 8.1875%		$11,352.00
Total		**$150,000.00**

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 jmk

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

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 Your 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

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 Q3 Q4	CY2025 Q1 Q2 Q3 Q4	CY2026 Q1 Q2 Q3 Q4
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			
STEP → FORWARD Governing Body Action + Implementation and Evaluation			
STEP ↻ ONGOING Administrative Coordination + Engagement and Communication			

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

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

Signature: Richard Brown
Email: 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	
☒	☐	**Written Determination (srvs)**
☒	☐	**RFP - Confidential info to be provided to GB by CPD Buyer**
☐	☐	**ITB (include bid tab)**
☐	☐	**Other:** _____
☐	☐	**Cooperative Agreements and GSAs and Statewide Price Agreements (include the cover page to show valid dat page, and items to be purchased)**
☒	☐	**Horizon Declination or Screenshot of horizonsofnewmexico.org/services.html (srvs)**
☒	☐	**Summary of Contract (only on contracts)**
☒	☐	**Current Santa Fe Business Registration (or Exemption if no tax)**
☒	☐	**Executed Contract or Price Agreement (legal and contractor must sign before purchasing approves)**
☐	☐	**Chief Procurement Officer (or designee) Approval for Exempt from Procurement (use memo on our site)**
☒	☐	**Evaluation Committee Report (RFPs only)**
☐	☐	**Signed Sole Source Determination, Vendor Written Quote, SS Letter from Contractors, and 30 Days Email**
☒	☐	**>20k = Memo addressed to City Manager (Under 150K) Committees/City Council (Over 150K)**

YES	N/A	
☒	☐	**Quote(s) (3 Valid & Current for Over 20k)**
☐	☐	**BAR**
☒	☐	**FIR**
☒	☐	**Certificate of Insurance (srvs)**

Heather Lamboy	Assistant Director, Planning & Land Use	5-16-2024
Department Point of Contact	Title	Date
Jason M. Kluck		05/20/2024
Department Director		Date
		May 21, 2024
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:

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

Andy Hopkins May 21, 2024

Budget Officer Approval: 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: hllamboy@santafenm.gov

Clerk #

Date of Execution:

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

Item #: 24-0352
Munis Contract #: _____
RFP: 24/20P

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 – Vison 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 Q2 Q3 Q4	CY2025 Q1 Q2 Q3 Q4	CY2026 Q1 Q2 Q3 Q4
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			■
STEP → FORWARD Governing Body Action + Implementation and Evaluation			■
STEP ↻ ONGOING Administrative Coordination + Engagement and Communication	■ ■ ■	■ ■ ■ ■	■ ■ ■ ■

Table 2: Crosswalk to RFP Work Plan	Phase 1	Phase 2	Phase 3
STEP 1 Mobilization and Understanding	Task 1 Task 2 Task 3	Task 4 Task 5	
STEP 2 Vision and Goals			Task 7
STEP 3 Scenario Planning			Task 6
STEP 4 Development of Preferred Plan			Task 7
STEP 5 Work Program and Funding Plan			Task 8
STEP → FORWARD Governing Body Action + Implementation and Evaluation			Task 9
STEP ↻ ONGOING 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 FOURTY-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 a broad as ISO Form CG 00 01 with limits not less than $2,000,000 per occurrence and $2,000,000 in the aggregate for claims against bodily injury, personal and advertising injury, and property damage. Said policy shall include broad form Contractual Liability coverage and be endorsed to name the City of Santa Fe their officials, officers, employees, and agents as additional insureds.

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

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

23. Records and Financial Audit

The Contractor shall maintain detailed time and expenditure records that indicate the date; time, nature and cost of services rendered during the Contract's term and effect and retain them for a period of three (3) years from the date of final payment under this Contract. The records shall be subject to inspection by the City. The City shall have the right to audit billings both before and after payment. Payment under this Contract shall not foreclose the right of the City to recover excessive or illegal payments.

24. Indemnification

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

25. New Mexico Tort Claims Act

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

26. Invalid Term or Condition

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

27. Enforcement of Contract

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

28. Notices

Any notice required to be given to either party by this Contract shall be in writing and shall be

delivered in person, by courier service or by U.S. mail, either first class or certified, return receipt requested, postage prepaid, as follows:

To the City: Heather Lamboy, Procurement Manager, City of Santa Fe
200 Lincoln Ave, Box 909
Santa Fe, NM 87504-0909
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

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
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:

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

I. INTRODUCTION 5

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

II. CONDITIONS GOVERNING THE PROCUREMENT 13

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. Offeror's 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. Electronic mail address required *21*
27. Use of Electronic Versions of this RFP *21*
28. Campaign Contribution Disclosure Form *21*
29. Letter of Transmittal *21*
30. Disclosure Regarding Responsibility *22*
31. Local Preferences *24*
32. Living Wage *25*

III. RESPONSE FORMAT AND ORGANIZATION **25**

A. NUMBER OF RESPONSES 25
B. NUMBER OF COPIES 25
1. ELECTRONIC SUBMISSION ONLY Responses *25*
C. PROPOSAL FORMAT 26
1. Proposal Content and Organization *26*

IV. SPECIFICATIONS **28**

A. GOALS 28
B. OBJECTIVES 29
C. ASSUMPTIONS 29
D. DETAILED SCOPE OF WORK 30
B. TECHNICAL SPECIFICATIONS 35
1. Organizational Experience *35*
2. Mandatory Specification *35*
3. Desirable Specification *36*
C. BUSINESS SPECIFICATIONS 36
1. Letter of Transmittal Form *36*
2. Campaign Contribution Disclosure Form *36*
3. Oral Presentation *37*
4. Cost *37*
5. Local Preference *37*

V. EVALUATION **38**

A. EVALUATION POINT SUMMARY 38
B. EVALUATION FACTORS 38
1. B.1 Organizational Experience (See Table 1) *38*
3. B.3 Desirable Specifications *38*
4. C.1 Letter of Transmittal (See Table 1) *39*
5. C.2 Campaign Contribution Disclosure Form (See Table 1) *39*
6. C.3 Oral Presentation (See Table 1) *39*
7. C.4 Cost (See Table 1) *39*
8. C.5. Local Preferences *39*
C. EVALUATION PROCESS 40

APPENDIX A **41**

ACKNOWLEDGEMENT OF RECEIPT FORM 41

APPENDIX B **43**

CAMPAIGN CONTRIBUTION DISCLOSURE FORM 43

APPENDIX C **47**

COST RESPONSE FORM 47

APPENDIX D **49**

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

Central Purchasing Office: 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 personable 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 personable 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

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
6. Submission of Proposal	***Potential Offerors***	***November 28, 2023***
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 , 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

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 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.

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

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 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 corelated 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.

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

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 at least 50% of the sub-contracted 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
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

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

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:**

Offeror Name	
Mailing Address	
Telephone	
FED ID#	
NM CRS#	

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 Contractually Obligate	B Negotiate*	C Clarify/Respond to Queries*
Name			
Title			
Email			
Telephone			

* 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.

Item#_____
Munis Contract# _____
RFP # 24/20/P

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

B. Broader Coverage and Limits. The insurance requirements under this Contract shall be the greater of (1) the minimum coverage and limits specified in this 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 Contact. 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:

_____
ALAN WEBBER, MAYOR

DATE: _____

CONTRACTOR:

_____
NAME

_____
TITLE

DATE: _____
CRS# _____

Registration # _____

ATTEST:

_____
KRISTINE BUSTOS MIHELCIC, 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 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.

EXHIBIT A

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**:

Offeror Name	WSP USA Inc.
Mailing Address	2440 Louisiana Blvd NE, Suite 400, Albuquerque, NM 87110
Telephone	505-881-5357
FED ID#	11-1531569
NM CRS#	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 Contractually Obligate	B Negotiate*	C Clarify/Respond to Queries*
Name	Manjeet Ranu		
Title	Senior Vice President		
Email	Manjeet.Ranu@wsp.com		
Telephone	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.

_____ November 28, 2023
Signature Date

Principal-in-Charge
Title (Position)

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

135+ Years in U.S.

Team with the Expertise to Deliver

15,500+ Employees

Collaborative & Experienced Team

300+ Offices

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

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, 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.

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

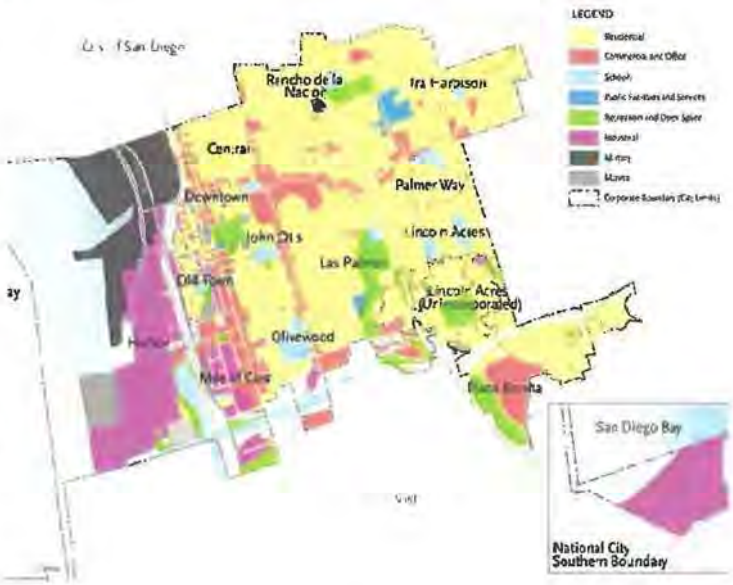
NJ DEPARTMENT OF ENVIRONMENTAL PROTECTION | ATLANTIC CITY REGION, NJ

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

LELAND CONSULTING GROUP

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.

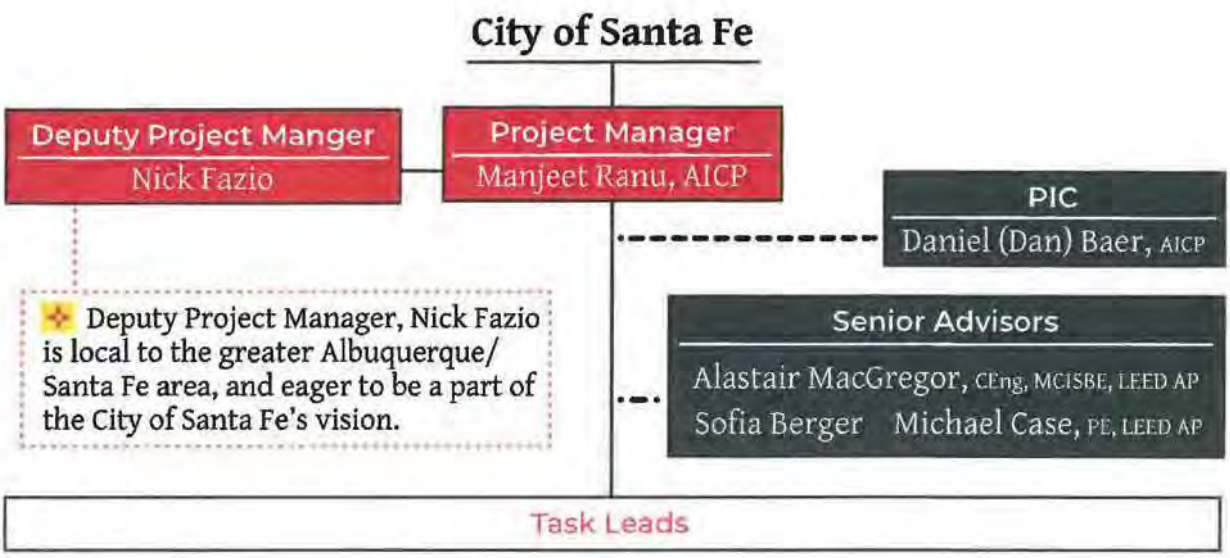
LOS ALAMOS TOURISM STRATEGIC PLAN

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.**



Base Mapping & Digital User Platform

Allyson Powers
Patrick Kresl
Jay Puckett, GISP

Public Engagement

Nick Fazio

Regional Trends, Fiscal Sustainability, Housing, & Economical Development

Chris Zahas, ACIP - LCG
Ted Kamp - LCG

Institutional Structures

Eryca Dinsdale, PE, PMP
Robert (Rob) DiAdamo

Transportation

Matthew Long

Water

Rebecca Borker, MPA

Land Capability & Existing Land Use Development

David Schumacher
Chris Geddes - DW
Jessica Garrow - DW

Historical & Cultural

Ted Roberts, M.A., RPA
Jennifer Hyre

Public & Private Utilities, Public Safety, Schools, & Parks & Recreation

Amy DiCarlantonio, AICP, ENV SP, LEED, AP BD+C

Municipal Infrastructure

Larissa James
Scott Cogan, PE, CQM

Growth Scenario Planning

Sara Khoeini, Ph.D.

Smart Cities

Jaco Cronje

Urban Design

John Loughran, AIA, AICP, PP, LEED
Chris Geddes - DW
Jessica Garrow - DW

Environmental Stewardship & Natural Resources

Joanna Franks

Implementation & Capital Programming

Alfonso Hernandez
Peter Waldt

Equity & Inclusion

Gabrielle (Gabi) Brazzil
Sean Scott

Subconsultants

- Leland Consulting Group (LCG)
- Design Workshop (DW)

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 if 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 Angles 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 Advisior, 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 CONSULITING 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

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)**
- 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

Hazwopper 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
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											
STEP → FORWARD Governing Body Action + Implementation and Evaluation											
STEP ↻ ONGOING Administrative Coordination + Engagement and Communication											

Table 2: Crosswalk to RFP Work Plan

	Phase 1	Phase 2	Phase 3
STEP 1 Mobilization and Understanding	Task 1 Task 2 Task 3	Task 4 Task 5	
STEP 2 Vision and Goals			Task 7
STEP 3 Scenario Planning			Task 6
STEP 4 Development of Preferred Plan			Task 7
STEP 5 Work Program and Funding Plan			Task 8
STEP → FORWARD Governing Body Action + Implementation and Evaluation			Task 9
STEP ↻ ONGOING Administrative Coordination + Engagement and Communication	Task 1	Task 1 + Task 4	Task 1 + 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 the 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 identity 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 overlayed 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;
- Nimbly 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 conversation 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 overlayed 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.

WSP helped create the Kansas City Spirit Playbook, the first update to Kansas City's comprehensive plan since 1997.

Table 3: Public Engagement	General Community	Equity-focused Communities (EFC)	Organized Stakeholders	Partners	Decision-makers
STEP 1 Mobilization and Understanding	• Open house on Assessment guiding themes and findings	• City staff engagement • EFC led conversations • Stipend community partners support	• City staff engagement	• Technical Advisory Committee	• Introduction to the team and work program • Stage gate readiness review
STEP 2 Vision and Goals	• Open house on vision and goals	• City staff engagement • EFC led conversations • Stipend community partners support	• City staff engagement	• Technical Advisory Committee	• Stage gate readiness review
STEP 3 Scenario Planning	• Open house on scenarios	• City staff engagement • EFC led conversations • Stipend community partners support	• City staff engagement	• Technical Advisory Committee	• Stage gate readiness review
STEP 4 Development of Preferred Plan	• Open house on draft General Plan	• City staff engagement • EFC led conversations • Stipend community partners support	• City staff engagement	• Technical Advisory Committee	• Stage gate readiness review
STEP 5 Work Program and Funding Plan	• Open house on work program and funding plan	• City staff engagement • EFC led conversations • Stipend community partners support	• City staff engagement	• Technical Advisory Committee	• Stage gate readiness review
STEP → FORWARD Governing Body Action + Implementation and Evaluation	• Regular communication • Online civic engagement tool	• City staff engagement • EFC led conversations • 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 administrate 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

CRS Number: 01195458002

Owner: WSP USA INC

License Number: 230545

License Type: Business License - Renewable

Issued Date: August 03, 2023

Classification: Business Registration - Standard

Expiration Date: August 03, 2024

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

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

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

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	$748,000
FY2026	$658,000
FY2027	$289,000

wsp

EXHIBIT B

wsp

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.

EXHIBIT B

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

Heather Lamboy	Assistant Director, Planning & Land Use	5-16-2024
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:

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

Andy Hopkins May 21, 2024

Budget Officer Approval: 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: hllamboy@santafenm.gov

Clerk #

Date of Execution:

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

TAXATION & REVENUE
NEW MEXICO

Audit & Compliance Division
Albuquerque District

Michelle Lujan Grisham
Governor

Stephanie Schardin Clarke
Cabinet Secretary

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	IDENTIFICATION NUMBER	Business Start Date
06-Dec-1983	01195458002-GRT	06-Dec-1983
Business Location: 2440 LOUISIANA BLVD NE		Business End Date
City and State: ALBUQUERQUE, NM		Zip Code: 87110-4383
Taxpayer Name: WSP USA INC.		Taxpayer Type: Corporation
Firm Name: WSP USA INC.		Filing Frequency: Monthly
Mailing Address: 4139 OREGON PIKE		
City and State: EPHRATA, PA		Zip Code: 17522-9550

Form Revised 02/2003

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

THIS CERTIFICATE IS NOT TRANSFERABLE

STATE OF NEW MEXICO TAXATION AND REVENUE DEPARTMENT
REGISTRATION CERTIFICATE

Date ID Issued	IDENTIFICATION NUMBER	Business Start Date
06-Dec-1983	01195458002-GRT	06-Dec-1983
Business Location: 2440 LOUISIANA BLVD NE		Business End Date
City and State: ALBUQUERQUE, NM		Zip Code: 87110-4383
Taxpayer Name: WSP USA INC.		Taxpayer Type: Corporation
Firm Name: WSP USA INC.		Filing Frequency: Monthly
Mailing Address: 4139 OREGON PIKE		
City and State: EPHRATA, PA		Zip Code: 17522-9550

Form Revised 02/2003

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

THIS CERTIFICATE IS NOT TRANSFERABLE

atL04 v40

10297506816001

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

CRS Number: 01195458002

Owner: WSP USA INC

License Number: 230545

License Type: Business License - Renewable

Issued Date: August 03, 2023

Classification: Business Registration - Standard

Expiration Date: August 03, 2024

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

TAXATION & REVENUE
NEW MEXICO

Audit & Compliance Division
Albuquerque District

Michelle Lujan Grisham
Governor

Stephanie Schardin Clarke
Cabinet Secretary

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	IDENTIFICATION NUMBER	Business Start Date
06-Dec-1983	01195458002-GRT	06-Dec-1983
Business Location: 2440 LOUISIANA BLVD NE		Business End Date
City and State: ALBUQUERQUE, NM		Zip Code: 87110-4383
Taxpayer Name: WSP USA INC.		Taxpayer Type: Corporation
Firm Name: WSP USA INC.		Filing Frequency: Monthly
Mailing Address: 4139 OREGON PIKE		
City and State: EPHRATA, PA		Zip Code: 17522-9550

Form Revised 02/2003

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

THIS CERTIFICATE IS NOT TRANSFERABLE

STATE OF NEW MEXICO TAXATION AND REVENUE DEPARTMENT

REGISTRATION CERTIFICATE

Date ID Issued	IDENTIFICATION NUMBER	Business Start Date
06-Dec-1983	01195458002-GRT	06-Dec-1983
Business Location: 2440 LOUISIANA BLVD NE		Business End Date
City and State: ALBUQUERQUE, NM		Zip Code: 87110-4383
Taxpayer Name: WSP USA INC.		Taxpayer Type: Corporation
Firm Name: WSP USA INC.		Filing Frequency: Monthly
Mailing Address: 4139 OREGON PIKE		
City and State: EPHRATA, PA		Zip Code: 17522-9550

Form Revised 02/2003

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

THIS CERTIFICATE IS NOT TRANSFERABLE

atL04 v40

10297506816001

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

CRS Number: 01195458002

Owner: WSP USA INC

License Number: 230545

License Type: Business License - Renewable

Issued Date: August 03, 2023

Classification: Business Registration - Standard

Expiration Date: August 03, 2024

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

Ver. 16 2/7/2020

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).

PRODUCER
Arthur J. Gallagher Risk Management Services, LLC
300 Madison Avenue
28th Floor
New York NY 10017

CONTACT NAME: AJG Service Team
PHONE (A/C, No, Ext): 212-994-7020 **FAX (A/C, No):**
E-MAIL ADDRESS: GGB.WSPUS.CertRequests@ajg.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Liberty Insurance Corporation	42404
INSURER B : Zurich American Insurance Company	16535
INSURER C :	
INSURER D :	
INSURER E :	
INSURER F :	

INSURED WSPGLOB-01
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. 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	X COMMERCIAL GENERAL LIABILITY	Y	Y	GLO 9835819-11	5/1/2024	5/1/2025	EACH OCCURRENCE	$ 3,500,000
	CLAIMS-MADE [X] OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 3,500,000
							MED EXP (Any one person)	$ 10,000
							PERSONAL & ADV INJURY	$ 3,500,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ 7,000,000
	X POLICY [ ] PRO-JECT [ ] LOC						PRODUCTS - COMP/OP AGG	$ 4,000,000
	OTHER:							$
A	AUTOMOBILE LIABILITY			AS7-621-094060-034	5/1/2024	5/1/2025	COMBINED SINGLE LIMIT (Ea accident)	$ 5,000,000
	X ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	HIRED AUTOS ONLY / NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	UMBRELLA LIAB [ ] OCCUR						EACH OCCURRENCE	$
	EXCESS LIAB [ ] CLAIMS-MADE						AGGREGATE	$
	DED RETENTION $							$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N			WA7-62D-094060-014	5/1/2024	5/1/2025	X PER STATUTE OTH-ER	
A	ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? [N]	N/A		WA7-62D-095609-074	5/1/2024	5/1/2025	E.L. EACH ACCIDENT	$ 2,000,000
A	(Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			WC7-621-094060-914	5/1/2024	5/1/2025	E.L. DISEASE - EA EMPLOYEE	$ 2,000,000
							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 Sante 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.

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

© 1988-2015 ACORD CORPORATION. All rights reserved.

ACORD®

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).

PRODUCER Arthur J. Gallagher Risk Management Services, LLC 300 Madison Avenue, 28th Floor New York NY 10017	**CONTACT NAME:** AJG Sevice Team **PHONE (A/C, No, Ext):** 212-994-7020 **FAX (A/C, No):** 212-994-7074 **E-MAIL ADDRESS:** GGB.WSPUS.CertRequest@ajg.com
	INSURER(S) AFFORDING COVERAGE — **NAIC #** **INSURER A :** QBE Specialty Insurance Company — 11515
INSURED WSPGLOB-01 WSP USA Inc. One Penn Plaza New York, NY 10119	**INSURER B :** **INSURER C :** **INSURER D :** **INSURER E :** **INSURER F :**

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 INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE	$
	☐ CLAIMS-MADE ☐ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$
							MED EXP (Any one person)	$
							PERSONAL & ADV INJURY	$
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$
	☐ POLICY ☐ PRO-JECT ☐ LOC						PRODUCTS - COMP/OP AGG	$
	OTHER:							$
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)	$
	☐ ANY AUTO						BODILY INJURY (Per person)	$
	☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	☐ **UMBRELLA LIAB** ☐ OCCUR						EACH OCCURRENCE	$
	☐ **EXCESS LIAB** ☐ CLAIMS-MADE						AGGREGATE	$
	DED RETENTION $							$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y / N						☐ PER STATUTE ☐ OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? ☐ N / A (Mandatory in NH)						E.L. EACH ACCIDENT	$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$
							E.L. DISEASE - POLICY LIMIT	$
A	Professional Liability CLAIMS-MADE			QPL0022630	11/1/2023	10/31/2024	Per Claim Aggregate	$2,000,000 $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

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

© 1988-2015 ACORD CORPORATION. All rights reserved.

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:	CBJCHBCAABAAHDe1AqnRPJ2vX8VjxxpCydrptVco68p2

"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
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

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

Email viewed by Travis Dutton-Leyda (tkduttonleyda@santafenm.gov)
2024-05-21 - 5:51:20 PM GMT- IP address: 63.232.20.2

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

Email viewed by EMILY OSTER (ekoster@santafenm.gov)
2024-05-21 - 10:07:03 PM GMT- IP address: 104.47.65.254

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

Powered by Adobe Acrobat Sign

Agreement completed.

2024-05-21 - 10:14:57 PM GMT

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

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 Your 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'sgoals 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.

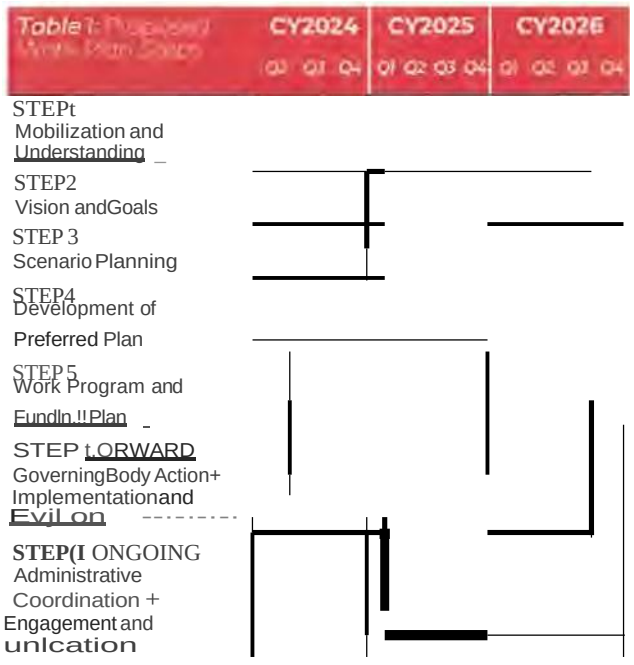
This contract proposes that the process for the General Plan Update be informed by a robust community conversation addressing the issues raised by the Governing Body, the associated recommendationsin

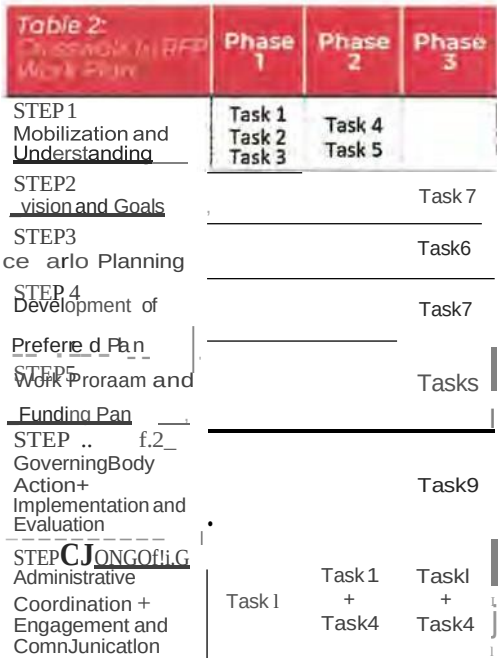
the Governing Body resolution that was approved on March 24, 2023, and other recommendations and subject matter for consideration as identified, such as growth planning and management, mobility and accessibility, adaptability, resiliency and sustainability, inclusion and equity, and economic strength and opportunity. Furthermore, the contract calls for staff and the consultant to undertake efforts to evaluate the 1999 planto identify its strengths and deficiencies. This willhelp 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 theRFPScope 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

description and scope of work for the General Plan update. The consultant(s) will beselected 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 asa "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 Fund100
Munis Org Name/Number: Land Use 1004501
Munis Object Name/Number: Professional Contracts 510300
Total: $1,887,871.87

CAPITAL ASSET
☐YesNo

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: <;a-,..7?t.1'"-'d

Email: jmkluck@santafenm.gov

Signature: Pu,-,

Email: rdbrown@santafenm.gov

CITY OF SANTA FE PROCUREMENT CHECKLIST

Contractor Name: WSP USA. Inc.

Procurement/contract Title:--""G...e...n...e.. ra...l .P..b.n...U...pl&'d...a..t..e" - - - - - - - - - - - - - - - -

Procurement MethodNehicle: ☐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: HeatherLamboy

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	NIA		YES	N/A	
IZI	☐	**Written Determination (srvs)**	C8I	☐	Quote(s) (3 Valid & Current for Over 20k)
12:1	☐	**RFP - Confidential info to be provided to GB by CPD Buyer**	☐	☐	**BAR**
☐	☐	**1TB (include bid tab)**	C8I	O	**FIR**
☐	☐	**Other:** _____	12:1	D	**Certificate of Insurance (srvs)**
☐	☐	**Cooperative Agreements and GSAs and Statewide Price Agreements (include the cover page to show valid dal page, and items to be purchased)**			
12:1	☐	**Horizon Declination or Screenshot of horizonsofnewmexico.org/services.html(srvs)**			
C8I	☐	**Summary of Contract (only on contracts)**			
	☐	**Current Santa Fe Business Registration (orExemption if notax)**			
	☐	**Executed Contract or Price Agreement (legal and contractor must sign before purchasing approves)**			
☐	☐	**Chief Procurement Officer (or designee) Approval for Exempt from Procurement (use memo on our site)**			
IZI	☐	**Evaluation Committee Report (RFPs only)**			
☐	☐	**Signed Sole Source Determination, Vendor Written Quote, SS Letter from Contractors, and 30 Days Email**			
12:1	☐	**>l0k:::: Memo addressed to City Manager (Under 150.K) Committees/City Council (Over 150.K)**			

-'-'--'"'eat4eti--'-'--'...;;..;...""""',.e'-a.11_4! Assistant Director. Planning & Land Use 5-16-2024

Department Point of Contact — Title — Date

7?1,. 05/20/2024

Defartment Director — Date

May21, 2024

Chief Procurement Officer — Date

ITT Representative — Title — Date

CoSF Version 3 12.1.2023

City of Santa Fe

Summary of Contract, Agreement, Amendment & Lease

All applicable fields to becompleted 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 MethodNehicle: Small Purchase ☐ RFP/VI /TB ☐ SoleSource ☐ GSA D Cooperative ☐ Exempt ☐ SWPA/ExistinO

Descriptionmtle: 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 theCity 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 Counc·,I *(Ifthe originalwent through GB,allamendments must gothroughD t a e. GBregardlessoftheamendmentreason)*

Amendment is for: N/A

2. HISTORY of Contract, Amendments & Lease/ Rent - Please Elaborate (option: attachspreadsheetifmultipleamendments)

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

3. Procurement History:

May21,2024

Purchasing Officer Review: Date:

Comment & Exceptions: 13-1-112. Competitive sealed proposals; request for proposals.

4. funding **Source:** General Fund Org / **Object:** 1004501/510300

11 ',;¼l.t.;-.r May 21, 2024

Budget Officer Approval: Date:

Comment & Exceptions:

5. Grant History (if applicable): N IA

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 g ov

Clerk#

Date of Execution:

ITT Representative (attesting that allinformation is reviewed) Title Date

Item#: 24-0352
Munis Contract #: 3250006
RFP: 24/20P

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 teons 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 th.e 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. Tue 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 descn"bed 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 proje<::t 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- Vison 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 Platfonn 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, publicdraft review and final
6. Digital User Platfom1 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 eachgroup, 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 docume.nt
2. Public communications and engagement materials
3. Administrative governance policy and procedure
4. Administrative draft, public review draft and final implementationwork program
5. Equitable project development anddelivery guidelines
6. Digital User Platform development: Phase 5

STEP FORWARD - Governing Body Action & Implementationand
Evaluation .
Approximately 3 Months

Scope of work and deliverables:

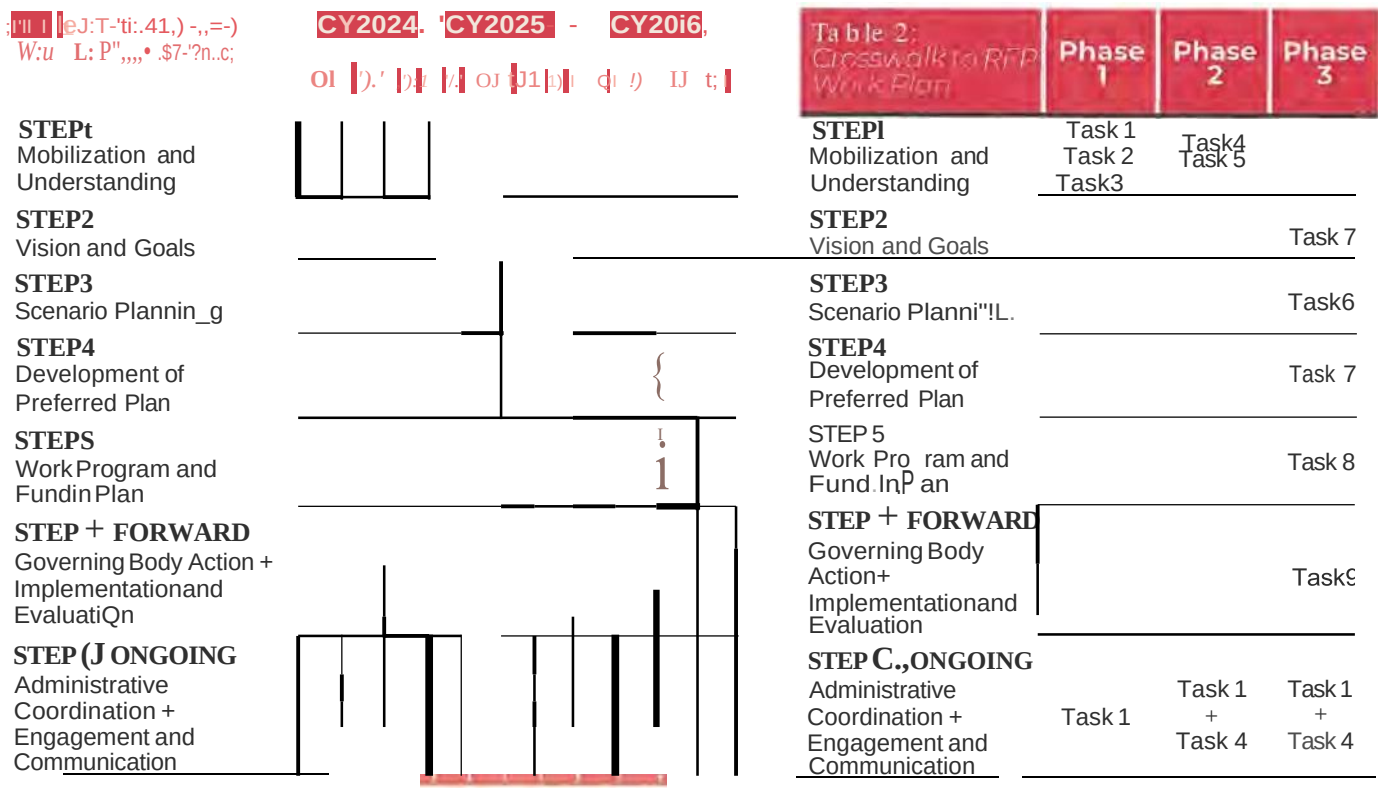
1. Public communications and engagement materials
2. Internal charrette to prepare for final action on General Plan and preparatory implementationsteps
3. One decision-maker briefing PowerPoint presentation for City staff to use in briefing decision-makers
4. One Planning Commission hearing and presentation
5, One Governing Body hearing and presentation
6. Digita1User 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:



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 satisfactorilyperformed 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 FOURTY-TWO THOUSAND, EIGHT ffiJNDRED SEVENTY-ONE DOLLARS and EIGHTY-SEVEN CENTS ($142,871.87) shall be paid by theCity 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 amoun1. In no event will the Contractor be paid for services provided in excess of the total compensation arnom1t without this Contract being amended in writing prior to those services in excess of thetotal 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 tennination 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 thanfifteen (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 e>,.."J)enses 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 m1disputed 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. !£!:!!!

TIIlS 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 ofthis 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 oftennination 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 tennination is based and (ii) state what the City must do to cure such material breaches. Contractor's notice ofteml.ination 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 temtlnation shall not nullify or othervvise 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 JS NOT EXCLUSIVE AND DOES NOT WAIVE THE CITY'S OTHER LEGAL RIGJITS 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 tenninate 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. TheContractor and its agents and employees shall not accrue leave, retirement, insurance, bonding, useof 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 -- Copyl'ight

All materials developed or acquired by the Contractor under this Contract shall become the property of th.e 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 0th.er 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 tenn 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 matelial 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 representationsand 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 thls 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.

l 5. Entire Agreement.

This Agreement, together with any other documents incorporated herein by reference and all related Exhibits and Schedules constitutes the sole and entire agi·eement 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 ofRFP #24/20/P and the Contractor's response to sucj:i 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 Jaw

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

18. Equal Opportunih· 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

TheContractor agrees tocomply with statelaws 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 ainount 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

Iftbe services contemplated under this Contract will be perfonned 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 Gen ral Liability** insurance shall be written on an occurrence basis and be a broad as ISO Form CG 00 01 with limits not less than $2,000,000 per occurrence and $2,000,000 in the aggregate for claims against bodily injury, personal and advertising injury, and property damage. Said policy shall include broad fom1. 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 tenn 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 urtder the policy is primary over any other valid and collectible insurance and provide a waiver of subrogation.

23. Records aDd 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 perfonning 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 pursuantto law. No provision in this Contract modifies or waives any provision of the NewMexico Tort Claims Act.

26. Invalid Term or Condition

If any term or condition of th.is 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 petformance 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 e"-'Press and in wiiting, 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

JO

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.,&?ov

To the Contractor: WSP USA Inc.
Daniel Sims, Senior Vice President
2440 Louisiana Blvd NE, Suite 400
Albuquerque, NM 87110
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 WlINESS 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, 202415:46 MDT)

ALAN WEBBER, MAYOR

CONTRACTOR:
WSP, USA Inc

Matthew Sibt4
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:

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

Pro osals Due Date: November 28, 2023

ELECTRONIC-ONLY PROPOSAL SUBMISSION

Contents

I. **INTRODUCTION** ..... **S**

A. P'-JRPOSE OF THIS REQUEST FOR PROPOSALS 5
8. 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

11. CONDITIONS GOVERNING THE PROCUREMENT **13**

A. SEQUENCE OFEVENTS 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. Basisfor 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 Penolties 20
22. Deportment Rights 20
23. Right to Publish 21
24. Ownership of Proposals 21
25. Confidentiality 21

26. Electronic mail address required 21
27. Use of Electronic Versions of this RFP 21
28. Campaign Contribution Disclosure Form 21
29. Letter of Transmittal 21
30. Disclosure Regarding Responsibility 22
31. Local Preferences 24
32. Living Wage 25

III. RESPONSE FORMAT ANO ORGANIZATION 25

A. NUMBER OF RESPONSES 25
B. NUMBER OF COPIES 25
1. ELECTRONIC SUBMISSION ONLY Responses 25
C. PROPOSAL FORMAT 26
1. Proposal Content and Organization 26

IV. SPECIFICATIONS 28

A. GOALS 28
B. OBJECTIVES 29
C. ASSUMPTIONS 29
D. DETAILED SCOPE OF WORK 30
B. TECHNICAL SPECIFICATIONS 35
1. Organizational Experience 35
2. Mandatory Specification 35
3. Desirable Speciftcation 36
C. BUSINESS SPECIFICATIONS 36
1. Letter of Transmittal Form 36
2. Campaign Contribution Disclosure Form 36
3. Oral Presentation 37
4. Cost 37
5. Local Preference 37

V. EVALUATION 38

A. EVALUATION POINT SUMMARY 38
B. EVALUATION FACTORS 38
1. B.I Organizational Experience (See Tobie1) 38
3. 8.3 DesirableSpecifications 38
4. C.1 LetterofTransmittal (See Table 1) 39
5. C.2 Campaign Contribution Disclosure Form (See Table 1) 39
6. C.3 Oral Presentation (See Table 1) 39
7. C.4 Cost (See Tobie 1) 39
8. C.5. Local Preferences 39
C. EVALUATION PROCESS 40

APPENDIX A 41

ACKNOWLEDGEMENTOF RECEIPT FORM 41

APPENDIX B 43

CAMPAIGN CONTRIBUTION DISCLOSURE FORM 43

APPENDIX C 47

COST RESPONSE FORM 47

APPENDIX 0 49

LETTER OFTRANSMITTAL FORM 49

APPENDIX E S1

NON-COLLUSION AFFIDAVIT 51
APPENDIX F 53
CONFLICT OFINTEREST 53
APPENDIX G 56
DRAFT CONTRACT 56

I. INTRODUCTION

A. PURPOSE OF TIDS REQUEST FOR PROPOSALS

The p11rpose of the Request for Proposals (RFP) is to solicit sealed proposals to establish a conttact 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 modem times. Modem 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, andpolicy guidance of theGeneral 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 anddrafting. The1999 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, theCity is endeavoring to revise theGeneral 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 theshort-term and long-term needs and desires of thecommunity 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 i 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 bas 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 Wo.rks.
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 th.e 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 wilJ 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

Central Purchasing Office: purchasine. RFP{cj,.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 onbehalf 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:
htt11s:J/d11•ofsanta{e.nnultare{ife.comlr-r61Zl99d2a98094545a0fc75efdb971(Yb

F. DEFINITION OF TERMINOLOGY

This section contains definitions of tenns 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 personabJe 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 personable 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 Bllsiness"** 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 Ttade 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 fmdings 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" identifya 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 ofOfferors' proposals.

17. **"E.valuation 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 bas been affixed to the contract(s) thus making it fully executed.

J9, **"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 ofliving.

24. "**Land Development Code**" means the Santa Fe Code of Ordinances chapters that regulates all development activity within the Citylimits. 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, suchcopy for use only for the purposes of evaluation.

40. "**Written"** means typewritten on standard 8 ½ x I I-inch paper. Larger paper is permissible for charts, spreadsheets, etc.

G. PROCUREMENT LIBRARY

A procurement 1ibrary 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.
hnps.//vvww.santafennuwv/bids_rips

Other relevant links:

Re.solution Adoptinl:! Next Steps to Revise the Cit\ of Santa Fe's General Plan

Cil\ of Santa Fe General Plan!1999)

City of Santa Fe Long-Ran2e 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
6. Submission of Proposal	***Potential Offerors***	***November 28, 2023***
7•. Proposal Evaluation	Evaluation Committee	November 29, 2023
S.•Selection of Finalists	Evaluation Committee	December 12, 2023
10* Oral Ptesentation(sJ	Finalist Offerors	January 8, 2024
11*. Finalize Contractual Agreements	Requesting Department/Finalist Offerors	January16, 2024
12•. Contract Awards	Requesting Department/ Finalist O:fferors	February 29, 2024
13.* Protest Deadline ..	Central Purchasing Office	+15 days

Dates indicated *in* Events 7 through 13 areestimates onlyand 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 Planningand 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__*RFPfa*santafenm.g.ov, 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 ILA. 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 Tearns | Join on the web

Learn *More* | Meeting options

Potential Offeror(s) are encouraged to submit written questions in advance of the conference to th Central Purchasing Office and the Procurement Manager (seeSection 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 l.D.

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

5. Response to Written Questions

Written responses to the written questions will be provided via email, on or before the date indicated in Section Il.A, Sequence of Events, to all potential Offerors who timely submitted an Acknowledgement of Receipt Form (Section Il.8.2 and APPENDIX A).

An electronic version of the Questions and Answers will be posted to:
https://www.santafenm.gov/bids_rfps

6. **Submission of Proposal**

At this time, only electronic propos[redacted]s allowed. Do not submit hard copies until further notice.

ALL OFFEROR PROPOSALS MUST BE RECEIVED FOR REVlEW 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 TI.A, SEQUENCE OF EVENTS. **PROPOSALS RECEIVED AFTER THIS DEADLINE WJLL 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 notbe 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 Il.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 andin 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 1sth 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. GENERALREQUIREMENTS

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 th1s 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 prune contractor shall be whoJly 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 Offerer may submit an amended proposal before the deadline for receipt of proposals. Suchamended 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 Offerer'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 bas 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 tradesecret in accordance with the Uniform Trade Secrets Act, §§57-3A-l 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 tbe 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 oftbe 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 MeX1co.

14. Basis for Proposal

Only information supplied in writing by the Central Purchasing Office and the Procurement Manager or contained in this RFP sha11be 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 jn 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 theproposal of any potential Offeror who is not a Responsible Offeror or fails to submit a Responsive Offer as defmed 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. lfthe 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 oftbe 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

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 anddated 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 crimina)]y 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. Jn 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 tax.payer *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 oftbis 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 pnJdent 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 awardand 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 Cbjef 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 federalfunds.

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 issue-d 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 awardan 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 at least 50% of the sub- contracted services go to subcontractors who are residentbusinesses.

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 hnps://santafenm.gov/econonuc-development/business•resources/livinH:-Wal:!.e-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 **!!!!!ll** 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 l.F.30) ELECTRONIC. for the public file, in order to facilitate eventual public inspection of the non•confidential versionofOfferor's proposal. Redacted versions **must** be clearlymarked 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 fl.le/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.sharefi/e.com/r-r6o1.99d2a9809454Sa0fc75efdb!J11f9b* **by the submission deadline** in **Section Il.B.6. Submissions cannot be password protected and must be a PDF format.** ***The Offeror ml!§l_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 tl,e submission link by tire 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 othenvise prevented from reaching the proper destinati,on server by any anti-virus or other security software will be deemed late.***

LATE PROPOSALS WILLNOT 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 tbat 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 Il.C.16)
G. Response to Specifications **(except Cost information which shall be.included** ONLY in **Cost Proposal/Binder 2)**
    l. 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 theproposal, 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.**

rV. SPECIFICATIONS

A. GOALS

The revised General Plan is intended to capture the desired vision and choices related to Santa Fe's future witha 20-year plan that will identify opportunities for beneficial use of the community's resources and guide the advancement of thecommunity. This vision will be accomplished through theimplementation of dynamic growth guidance strategies and actionable implementationsteps in the interest of ensuring a vibrant sense of place and belonging. These strategies and implementationsteps will reflect and promote overarching community values, trends andthemes, andcorrelate concepts such as sustainability, preservation of and access to resources, community and cultural engagement, connectivity, affordability, economic opportwrity andprosperity, 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 cohesio 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 uni e 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 reyjew process that balances the goals of the General Plan when detennining 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 communjty 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 talce 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 oftbe 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 anddistribution of materials including mailings, meeting set-up, and other logistical and administrativefunctions.

City staffwill coordinate meeting logistics with any working group, stakeholder group, or committee that may be agreed uponduring 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 monthlywritten (PDF format) status reports including a summary of all project activity and core]ated 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 allrelated "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 l. Administrative Coordination:
The City is seeking the best approach, process and best practices todevelop 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 partof the development of the plan.
   d) Conduct in-person introductions and tours as needed. Work with City staff andleadership to evaluate current long-range planning practices anddevelop 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. andproduction 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 eport: The findings resulting from analysis of theabove items will be summarized in a written(PDF fonnat) Assessment Report. The findings will identify relevant planning issues, a summary of the:findings, andpolicy 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 theproject 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 stafC elected officials, the public, developers and stakeholders to access a user-friendly on-line version of theGeneral 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 Citystaff.

1) The platform must include all maps, data andsrudies. The maps, data and studies should take advantage of ESRI Storymaps or similar technology to be interactive andeasily 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, theWater 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 wm 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 andexecution 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 l 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 anunderrepresentedcommunity, such *as* Spanish speaking, indigenous, youth, low-income, etc.
   ii) The planshould recommend payment structure for equity representatives.
c) Review and consider Culture, History, Art, Reconciliationand 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 andin-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 anddesires.
- Thereport 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 theoutcomes of proposed planning policies.

Task 7. **General Plan Draft**

Theconsultant will prepare the first draft of the General Plan. Thedraft shall include analysis and recommendations for each of the topics listed below. Other than certain requiredsections, the General Plan tnay be organized in a manner that best suites the project's overall goals, the vision of the project team and the consultant's worldlow 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 andlong-tenn 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. Jntegrate Future Land Use Map into Digital User Platform to demonstrate theconnection 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 theCity 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, SustainabilityPlan
   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 penneable, 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 Planwith the following components:

a) Provide detailed ImplementationPlan that ties each recommendationto achlevable goals and objectives.
   i) Each goal/objective should include proposedcost, departmental responsibibty, and timeline.

Administration Planshould include procedures for the following:

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

Task 9. Plan Adoption and Publication

Theconsultants will work in tandem with City staff and City leadership throughout the duration of the General Planadoption 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 b responsible for the publication of General Plan, in.duding:

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 andcommunity 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 theresulting 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

TheOfferor'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 bow they have demonstrated the ability to successfully collaborate with Citystaff, 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 Platfo and elation 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 mun.icipalities 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 ofNMSA 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 usedin the evaluation of individual potential Offeror proposals by sub-category.

Evaluation Factors *(Collespond ro section IV.B and IV C)*	Points Available
B. Technical Specifications	
B.L Or anizationalExperience	200
B. 2. Mandatory Specification	250
B. 3. Desirable Specification	200
C. Business Specifications	
C.l. Letter Of Transmittal	Pass/Fail
C.2. Campai!!Il Contribution Disclosure Form	Pass/Fail
C.3. Oral Presentations	200
C.4. Cost	150
TOTAL POINTS AVAILABLE	**1000**
C.5. City of Santa Fe Local Preference per Section *NC.* 2	**60**
C.5. City of Santa Fe Local Preference using Local Subcontractors Section *N* C.2	**30**

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 O:fferor's response inthis 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 ofOfferor'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. (Ifno 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 0:fferor'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 basedupon 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 Cify 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 sha11 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)

l. 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 Cityshall deem the bid or proposal submitted by a non-local resident business to be 3% lower than the bid submitted, if and only at least 50% of the sub-contracted services go to subcontractors who are residentbusinesses.

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. Inaccordance with NMSA 1978, 13-1-117, the responsible Offerors whose proposals are most advantageous to the City takinginto 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.

APPENDIXA

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 givenby the prospective contractor or a family member or representativeof 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 nocontribution was made.

A prospective contractor or a family memb r 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.

Fwthermore, 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 bas 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, subscriptio loan, advance or deposit of money.

or other tlring 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 titne 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 s()urce 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 Offi.cial(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

APPENDIXC
COST RESPONSE FORM

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

All amounts provided must include all labor, materials, equipment, transportatio configuration, installation, traming afl.d 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 SectionII.C.29). DO NOT LEAVE ANY ITEM BLANK! *(NIA,* None, Does not apply, etc. are acceptable responses.)

RFP#: 24/20/P

1. Identify the followin2 information for the submittin2 org-anization:

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 Contractually Oblie-ate	B Neeotiate*	C Clarit\'/Respond to Queries*
Name			
Title			
Email			
Telephone			

* **If** the md1V1dual identified m Column A also performs thefunchons 1dennfied m Columns B & C, then no response 1s required forthose Columns. If separate individuals perform the functions in Columns B and/orC, **they** most be identified.

3. **Use of subcontractors** (Select one):
___ No subcontractors will be used in the performance of any resultant contract, OR
___ The following subcontractorswill 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.** *(NIA,* 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 foilowing:

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

_____ _____,20__ _
Authorized Signature and Date *(Must be sign,ed 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_____

APPENDIXF

CONFLICT OF INTEREST

CONFLICT OF INTEREST STATEMENT FOR CONSULTING FIRMS

Complete.. *rig,,* ***@d retm·11 with your propm: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 ofJnterest 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 alsocertify that there is no conflict of interest with the Project. Ifthere is a conflict with the Project, then the Planning Consultant andknown key personnel needs to descnbe 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 organizationalconflict of interest prior to theaward 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 bas 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 infonnation 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 believethat anyperson who has access to the General Plan Update contract confidential information bas or intends to disclose that information in violation of this agreement.

This statement must be fullycompleted and signed by anauthorized representative.

Company Name:

_____

Authorized Representative/Title:

_____

Phone Number:

_____

Fax.Number:

_____

Email Address:

_____

Signature:

_____

Date:

_____

The abo e 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.

APPENDIXG

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.

Item#_____
Munis Contract# _ _ _ _ _ _
RFP # 24/20/P

CITY OF SANTA FE

PROFESSIONAL SERVICES AGREEMENT
General Plan Update

TlilS 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 tbe 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 qualific tions 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 tbe 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 implementationsteps in the interest of enswing 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 excee''d 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/BREACHOF 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: l) 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 suchaction 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 ITsufficient 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 accme 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 doso, 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 dueor 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 infonnation provided to or developed by theContractor 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 - Copyri2,ht.

All materials developed or acquired by the Contractor under this Contract shall become the property of the City and shall be delivered to the C1ty no later than the termination date of this Contract Nothing developed or produced, in whole or in part, by theContractor 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 ftmding 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 eotire 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 writtenand 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 statemenJs in the body of this Contract shall control.

15. Penalties for violation oflaw.

The Procurement Code, Sections 13-1-28 through 13-1-199, NMSA 1978, imposes civil and criminal penalties for its violation. In addition, theNew 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 oftbe State ofNew 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 seriousmedical 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 bein 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 theamount required w1der 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 shalJ 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 onan occurrence basis and be a broad as ISO Form CG 00 01 with limits not less than $2,000,000 per occurrence and $2,000,000 in the aggregate for claims against bodily injury, persona] 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 (I) 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 thanthe 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 thedate 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 liabihties 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, s11it 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 ofliability 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 shallnot 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, a,s 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 thatno further action, resolution, or approval from Contractor is necessary to enter intoa 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 Contact. 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 bas 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 tbis Contract will cause the City -irrevocable harm and that a remedy at law for such a failure would be an

inadequate remedy for theCity, 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 fromother sources in sufficient timeto permit theContractor to meet the required delivery scheduled. The rights and remedies of the Cityprovided 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:

_____
ALAN WEBBER, MAYOR

DATE: .....

CONTRACTOR:

_____
NAME

_____
TITLE

DATE: .....
CRS# _____

Registration# ____

ATTEST:

_____
KRISTINE BUSTOS MIHELCIC, 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 incJude, 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 implementationsteps 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, communjty 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, theCity aspires to the following goals:

1) Enhance the City's quality oflife 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 residentiaJ 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 transportationnetwork 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 communjty 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 andhow 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:
Citystaff 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 lnformation 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. Duringespecially intense periods, these meetings may take place weekJy. Consultant will produce monthly written (PDF format) status reports including a summary of all project activity andcorelated 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 threephases, hut 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

PHASEl

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 intern.al 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 keyissues, 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[1]" analysis or similar analysis.
7) **Urban Design**
8) **Transportation**
9) **Public and Private Utilities**
10) **ffistorical 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, andpolicy 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. Theplatform 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 ofESRI Storymaps or similar technology to be interactive and easily understood.
2) Theplatform will integrate other adopted City plans, including the plan texts and map components such as the Residential Pipeline Map, Bicycle Master Pl 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 wi1l 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 tha!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 bas a role in its success.

J) The Public Engagement Plan should include the following elements:
   a) Inclusive meeting provisions, such as:
      i) Foodand 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 recruit equity representatives to drive engagement in their commuruty, 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 recomm(!nd 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 andSpanish 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 anddesires. 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 andengagement, 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 theconnection 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 aheady 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 neighborl1ood 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-sbii:\.
   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 nee-ds 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.l.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 Planto the project website.
iii) Finalizing any other aspects of the project.

EXHIBIT A

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

APPENDIXD
Letter of Transmittal Form

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

RFP#: 24/20/P

1. **Identifv the following information forthe submitting organization:**

Offeror Name	WSPUSAinc.
Mailina Address	2440 Louisiana Blvd NE, Suite 400, Albuquerque NM 87110
Teleobone	505-881-5357
FEDID#	11-1531569
NMCRS#	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 Contractually Oblieate	B Ne2otiate*	C Clarifv/Respond *to* Queries*
Name	ManieetRanu		
Title	Senior Vice President		
Email	Manjeet.Ranu®wsp.com		
Telephone	858-869-7190		

* If the individual identified in Colwnn A also perfoJ'Illll the functions identified in Columns **B** & C, then no Tcsponse is required for those Columns. If separate individuals perfonn the functions in Columns B and/or C, they must be identified.

3. Use **of subcontractors** (Select one):
___ No subcontractors will be usedin 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.)
NIA
(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 Section11.C.l. of this RFP;
- I concur that submission of our pro_posa1 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 Box909
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 beeneagerly aw.titing 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 Comprcher1sive
  Inclusive Engagement
  rmpactful Innovations
- Tutu.re **Ready**
- Immediately Intplementable

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 infrastructureprojects across the globe-our **experience and approach ensures that this willbe an actionable General Plan.**

Our team oflocal, 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, and13-1-191.1, 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.

Fwthermore, 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 publicofficial'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 bas 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 notinclude the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer aportion or all of their ti.me 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) _____

_____

Pwpose 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)

0	Signed Letter of Transmittal	1
0	Signed Campaign Contribution Form	3
e	Table of Contents	6
G	Proposal Summary	7
0	Response to Contract Terms & Conditions	8
0	Offerer's Additional Terms & Conditions	9
e	Response to Specifications	10
	l. Organizational Experience	10
	2. Oral Presentation	50
	3. Mandatory Specification	51
	4. Desirable Specification	79
	5. Local Preference	80
0	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 technologicallysmart 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 Cityinitiatives, 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 teamlive 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 Feand 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:

- AdministrativeCoordination
- Existing Conditions
- BaseMapping
- Regional Trends
- Land Capability Analysis
- Existing LandUse 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

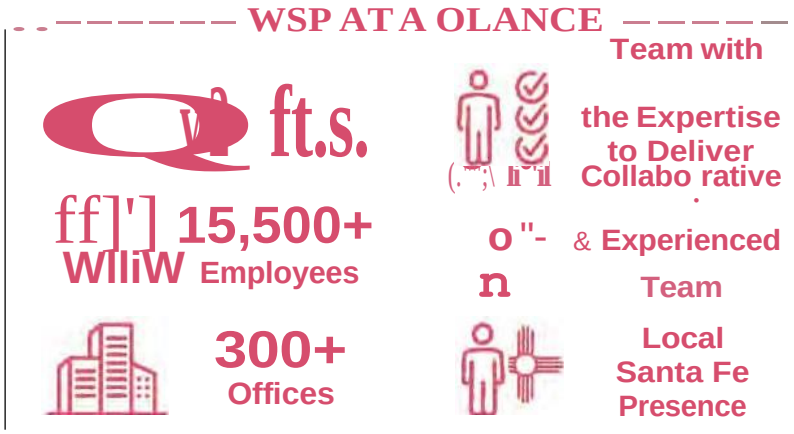
WSP USA Inc. requests no additional contract terms andconditions.

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 is a multidisciplinarystrategy, 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 embeddedin the process to inform decision-making. Investing in these processes properly and being willing to re-evaluate initial assumptions provides much better predictabilityfor 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

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: thrivingdowntowns, 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, andfinancial 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 34years of experience providing real estate and urban planning services to public and private sector clients across the United States.

DESIGNW'ORKSI-IOP

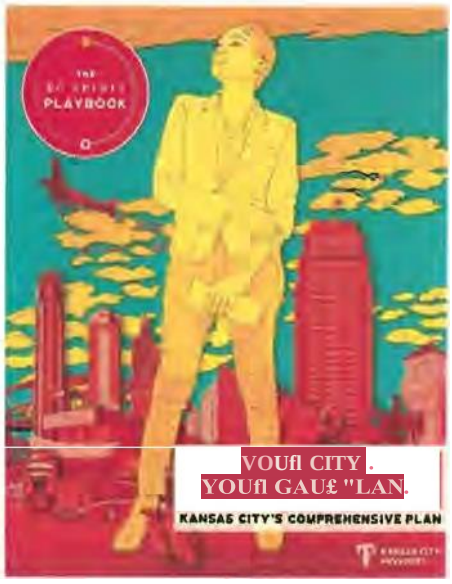
As an international design studio, Design Workshop learned the value of building community across cultures, geographies, and economies. Whether designing a restorative private garden, reimagining an underperformingdowntown center or developing the vision for a contemporary park within a fragile ecosystem, 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 openspace.

PROJECTS

KANSAS CITY SPIRIT PLAYBOOK COMPREHENSIVE PLAN

C/7Y *OF* ***KANSAS CITY*** *f* ***KANSAS*** *CITY, MO*



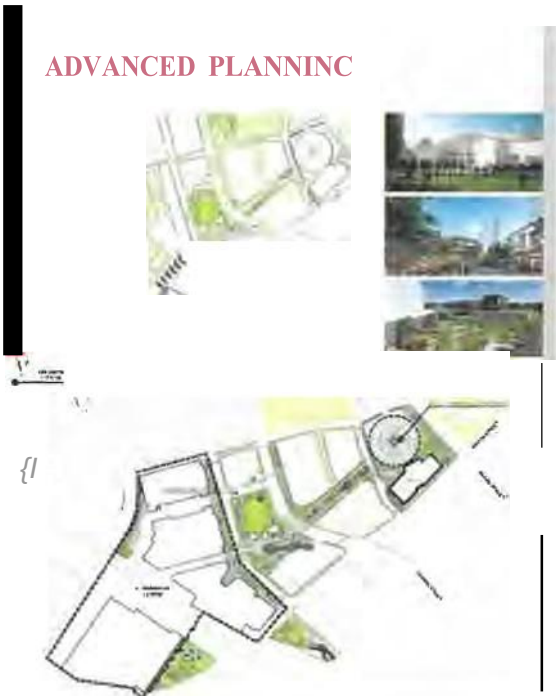
Similar to the Santa Fe General Plan Update, the Kansas City Spirit Playbook was the first update to the Comprehensive Plan for a mid-size city since the 1990s. WSP focused on recommendationsfor key issues relevant to Santa Fe such as public transportation,affordable housing,jobs access, and multi-modal 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 plancan be used as a tool in daily decision-makingat 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 openspace, publichealth, affordable housing, business development, and other topics. Each of the objectives include analysis and narrative describing the purpose of the objective, detailed actionsteps, 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 recommendationswill 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.
- **TransportationPlan** Proposes enhancements to the multimodal transportationand 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 transportationand 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 becreated 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 raillines.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 linkwith 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** f **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. rn partnership with WSP, the content of the Capital Plan will be renewed and reprioritized regularly to reflect the emerging needs of the state and NJTransit's customers.

RESILIENT NJ REGIONAL RESILIENCE ADAPTATION ACTION PLAN

NJ DEPARTMENT OF ENVIRONMENTAL PROTECTION/ ATLANTIC CITY REGION, NJ

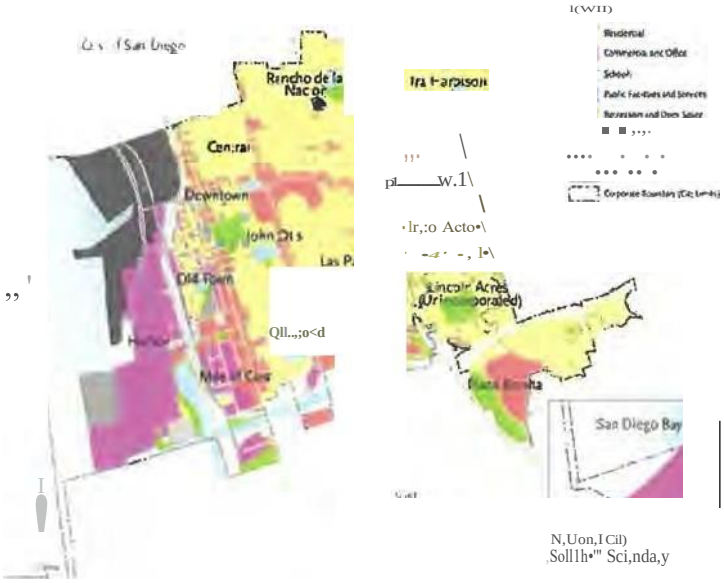
WSP is currently leading a consultant team in the development of a Regional Resilience and Adaptation Action Plan for the Atlantic County Coastal Region under the NJ Department of Environmental Protection (NJ DEP) Resilient NJ program. The U.S. Department of Housing and Urban Development (HUD)-funded 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 dimate vulnerabilities.

NATIONAL CITY MUNICIPAL CODE, ZONINCi 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-basedapproach to the planning process that will be taken for Santa Fe.** The project focused on improvingboth 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 f LOS ALAMOS, NM

Los Alamos, New Mexico is richwith 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.**

City of Santa Fe

Deputy Project Manger
Nick Fazio

Project Manager
Manjeet Ranu, AICP

Deputy Project Manager, Nick Fazio is local to thegreater Albuquerque/ Santa Fe area, and eager to be a part of the City of Santa Fe's vision.

PIC
Daniel (Dan) Baer, Ater

Senior Advisors
Alastair MacGregor, ci:ng, Mc1sBE, LEED AP
Sofia Berger
Michael Case, *n.* LEED AP

Task Leads

Base Mapping & Digital User Platform
Allyson Powers
Patrick Kresl
Jay Puckett, GISP

LandCapability & 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
PeterWaldt

Institutional Structures
Eryca Dinsdale, PE,PMP
Robert (Rob) DiAdamo

Municipal Infrastructure
LarissaJames
Scott Cogan, PE, CQM

Equity & Inclusion
Gabrielle (Gabi) Brazzil
Sean Scott

Transportation
Matthew Long

Crowth 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

CERT/FICATTONS/ 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 sigruficant states as a land use, transportation, and environmental planner, with urban designexpertise. He was an executive for three large urban transportation agencies in the Los Angeles, SaltLake, and Atlanta regions. He also ledcommunity development for cities in the SanDiego and Dallas regions. His transit experience involved leading and administering transportationplanning, 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, buildingsafety, 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 irutiatives 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 MAf\JAGER AND PUBLIC ENG/\GEMENT PI_AN LEAD

NICK FAZIO

DEPU7Y ***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/ MEMBI=RSHIPS

American Planning Association

OTHER LANGUAGES

Spanish (conversational)

Nick's experience as a multidisciplinaryconsultant 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 if 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-I N-Cf-lARGE
Ar-JD 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-relatedissues, 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 transportationand 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

CERT/FICATIONS/ 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 workfor global portfolio analysis. His portfolio includes Net Zero Carbon workfor 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 forJurong Lake eco-city, Tianjin eco-city, Marina Bay and Tanggu; and many of the world's most sustainable sports venues including GoldenlCenter, Intuit Dome, Al Wakraj Stadium, and the Los Angles 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 citystrategies; 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 15years of infrastructureexperience 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)**

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 e ergy leadwithin 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

31Years 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/implementationof 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, NorthCarolina 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|) D|GITAL USER PL!-\TFORrvl 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-drivencontent, web-based applications that allow clients to update sites themselves, interactive maps, client-administeredsurveys 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 rvlAPPIr\JG
/\ND DIGITAi USER PLATFORM SUPPORT

JAY PUCKETT, GISP

ASSOCIATE VICE PRESIDENT, CEOSPATIAL 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 tec ology toa 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 trainingin 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 Advisior, Baltimore County Sewer Consent Decree Program Management, **Baltimore County (MD)**

l.8.MDCONSUL11NGGROJP

REGIONAL TRENDS,
FISC/\L SUSTAINABIUTY, HOUSING,
AND ECONOMIC DEVELOPMENT /\SSESSMENT LEAD

CHRIS ZAHAS, AICP

LELAND CONSUL/TING 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)

LELANDOONSULTINGGROOP

REGIOI\JAL TRENDS,
FISCAL SUSTAINABI 11Y, HOUSING,
AI-..JD FCONOMIC 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,BaruchCollege

MS, Architecture, Catholic University of America

CERTIFICAT10NS/ 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 transportationand 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, withan 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

LAI\JD CAPABIL11Y,
EXISTING LAND USE DEVELOPMENT,
AND URBAN DESIGr'--J 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 pub)ic spaces. With over 20 years' experience, he believes that it is the responsibilityof 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, WestJordan and Midvale Station Area Plans, **West Jordan and Midvale (UT)**

DESIGNWORKSHOP

U\.ND CAPABILITY,
EXISTIr\JG LAND USE DEVELOPMENT.
ANP 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 Planand 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)**

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 20years of national and international experience, Amy DiCarlantonio has helda variety of roles including national practice leadfor 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. Acertified 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. Asa 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.

Projed Manager, Resilient New Jersey Atlantic County Coastal Region (ACCR) - Regional Resilience and Adaptation Action Plan, **NewJersey 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 RESOURCES LEAD

TED ROBERTS, M.A., RPA

***SENIOR** ARCHAEOLOGIST*

23 Years of Experience

EDUCATION

BA, Anthropology, Wayne State University

MA, Anthropology (Archaeology), Northern Arizona University

*CERT/FICATIONS/ **LICENSES/ MEMBERSHIPS***

Registered Professional Archaeologist (67579909)

Secretary of the Interior's Professional Qualification Standards

New Mexico Archaeological Council

ArchaeologicalSociety 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 smallsurveys 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 & CULTUR/\L'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

CERT/FICATIONS/ LICENSES/ MEMBERSHIPS

FAA Qualified Airport Wildlife Biologist

U.S. Fishand Wildlife Service Recovery Permit for NM, AZ, NV,andCA

Wetland Delineator Certification: NM

OTHER LANGUAGES

French (fluent)

Jennifer has managed multiple on-call contracts throughout New Mexico and specializes in multi-disciplinaryenvironmental compliance, permitting, and mitigation needs for local government, public works, andland 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

S.S., Fish, Wildlife, and Conservation Ecology; New Mexico State University

CERTIFICATIONS/ LICENSES/ MEMBERSHIPS

Wetland Delineation Certification, Wetland Training Institute

Hazwopper 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. Fishand 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 STITUTIONAL 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

CERT/FICATIONS/ 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. Shehas over 20 years of infrastructure experience, specializing in business improvements that drive organizational results with actionable options, recommendations, and implementationsupport. 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 transportationand asset management positions at a large consumer-product corporation.

- Project Manager, OrganizationalAssessrp.ent - San Mateo County Express LaneJoint 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 STPUCTUPES SUPPORT

ROBDIADAMO

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/ UCENSES/ MEMBERSI-IIPS

BoardofBar 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, transportationoperations, and infrastructure projects, including over twelve years ofleadership experience in senior policy, management, and legal positions in state government.

Prior to WSP, Robserved as the Executive Director for Commuter Rail at the Massachusetts Bay TransportationAuthority, overseeing commuter rail and ferryoperations. He currently teaches Local Government Law at Boston University School of Law.

- Task Lead, Hudson Bergen Light Rail Line - Procurement and Technical Documents, **NewJersey Transit (NJ)**
- Team Member, Communication Based Train Control - Interdepartmental Collaboration Plan, **New York MTA (NY)**
- Task Lead, Project Manager, Commuter RailService 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)**

GKOWTH SCE AR!O 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 Khoeinispecializes 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 SanDiego 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 ABMto connect accessibility-basedequity evaluation to ABM systems. Beyond her professional roles, Sara is a committee member ofTRB's AED20 (UrbanTransportationData 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, l-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)**

-IMPLEMENT/-\IION & CAPITAL PP.OGRAMMlf\IG LE..t\D

ALFONSO HERNANDEZ

ASSISTANT VICE PRESIDENT, ADVISORY SERVICES

18 Years of Experience

EDUCATION

BS, PublicJustice 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)**

IMPLEMEf\ITATION & CAPITAi_ PROGRAMMING SUPPORT

PETERWALDT

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)

CERT/FICATIONS/ LICENSES/ MEMBERSHIPS

Region Plan Association: Member NewJersey 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 Developm nt, 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, NYJetsfor 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 deliveringequity 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 (CityofMilwaukee$_1$ 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)**

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

CERT/FICATIONS/ 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

CERT/FICATIONS/ LICENSES/ MEMBERSHIPS

Professional Engineer (RSA)

Certified Data Centre Professional (EXIN)

PMP

IEEE, SAIEE

Engineering Council of South Africa (ECSA)

OTHFR 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

CERT/FICAT/ONS/ LICENSES/ MEMBERSHIPS

Certified Benefits Realization Practitioner

Member of the Asset Management Council, Australia

1SO55000 Gap Assessment

LarissaJames 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 withinoperations, 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 NewJersey Enterprise Asset Management Division**
- Program Manager and Technical Director, Enterprise Asset Management (EAM) Program Business Partner Operations, **Port Authority of New York and NewJersey 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 readyapproach tailored for the client. This entails helping clients identify and address infrastructure and/or organizationalissues 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 LineTechnical 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 muchlike cities across the United States, with production-built suburban neighborhoods servedby 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 wonderfol, magical place that experiences challenges similar to many citiesbut 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 amcnilies
- L:imily-friendly and neighborhood focused
- Growth that is consistent with and protective of Santa Fe's way of life
- Sustaincibilil"y as a watchword of the City
- Invest in supporting the workforce, growing opportunities for all
- A better future
- Sustaimng innovations
- A just Santa re

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-allagree 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, Reconciliationand Truth(CHART) process was and continues to be a pivotal epoch for Santa Fe that isstill 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 todayand tomorrow in a manner that is guided by Santa Fe.

Diversificationto 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 sitona shelf.

A FEW THEMES IN OUR TEAM'S SCOPE OF WORK

Clearly Defined Process and Governance

Scenario Planning to Promote Consensus Building

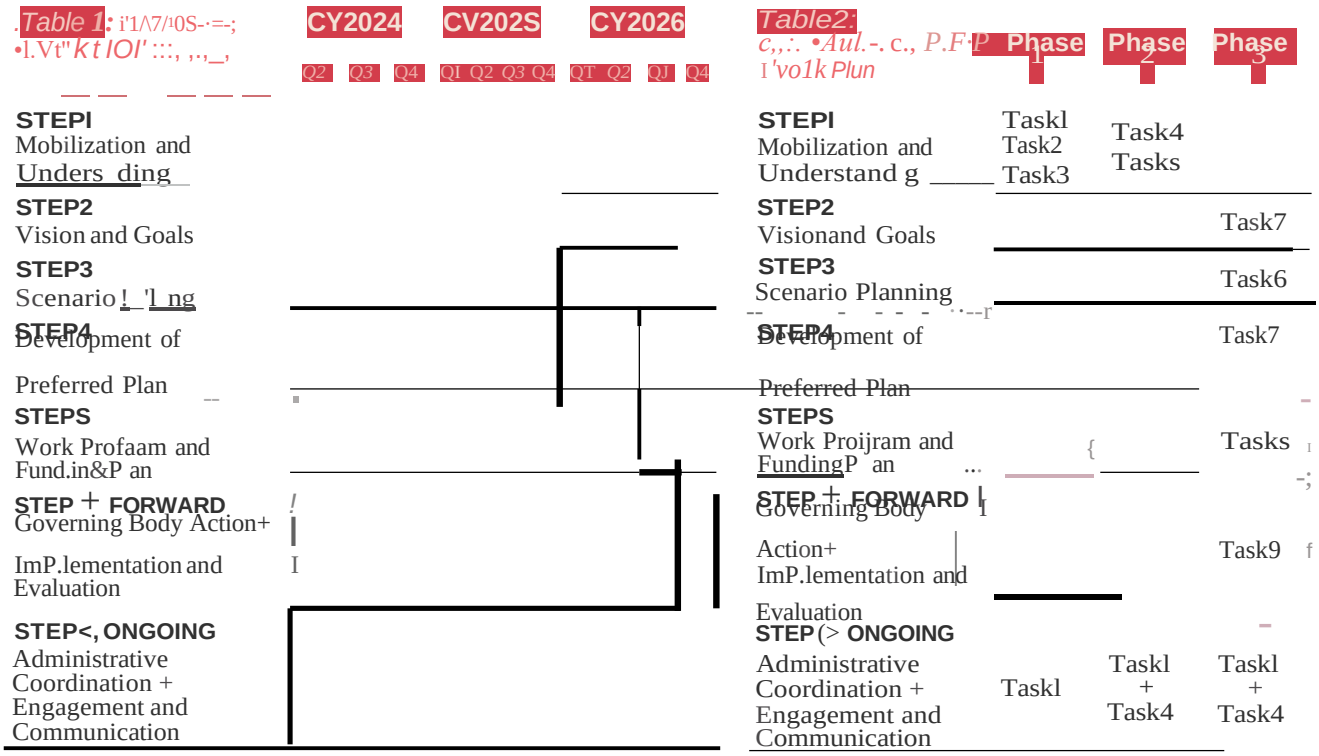
Implementation to Drive Outcomes and Capital Programming

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 implementationtool 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 Planand eventual LDC update.



FOUNDATION: THE FIRST BUILDING BLOCKS ARE LAID HERE

What's missing and where? Who is it for and how willit 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

Tms 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 usingan 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, communkate 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 sustainabilitygoals.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 rang 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 beenaccomplished 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 willidentify 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 eachsubject 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 dearly defined as a chapter within the Assessment Report to ensure a clear transition between project steps and all existingconditions, trends, and engagement findings are incorporated into the General Plan Update.

REVIEW OF PRIOR PLANS & STUDIES & EXISTING POLICIES

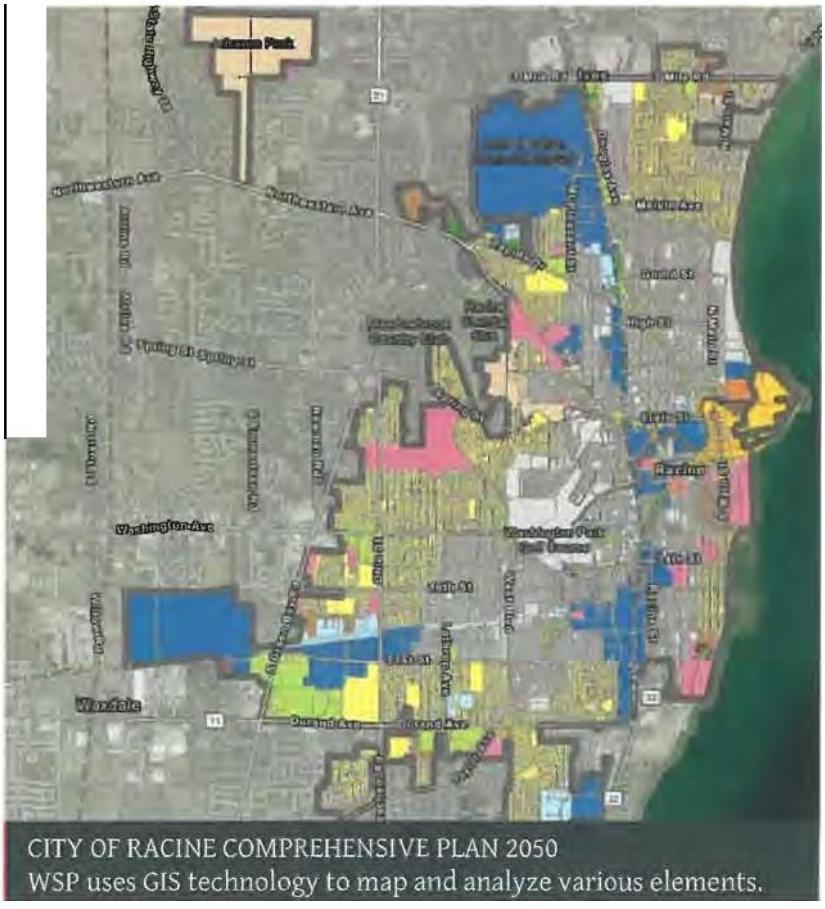
As a starting point, the WSP team will review prior plans and studies provided by the client to understand the existing conditions and planning goals for the City. We will also review and summarize existing policies that will influence future growth and the feasibility of development. It will be important that the General Plan Update reflect prior decisions and public feedback rather than starting completely anew-respectfulof 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 Genera] 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-makingin 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 playa 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 overtime.

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 willserve 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 redible an can be supported by a wide range of 1mplementmg 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.

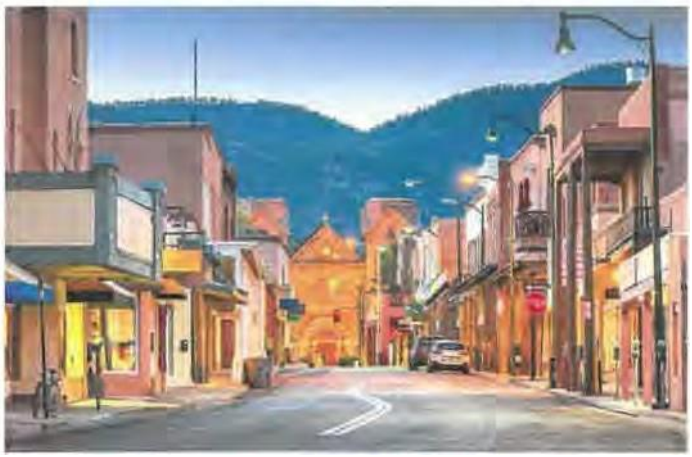
We engineered an innovative underpass structure to be constructed from the top down, incorporating prefabricated elements to speed up construction, minimize delays and disruptions to the public, and fit the design to site-specific conditions.

EXISTING LAND USE DEVELOPMENT

Santa Fe bas grownsignificantly 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 transportationcorridors, and existing neighborhood associations, we will developan official Neighborhoods and Districts map for the City. This map will consider the built form, natural characteristics,development density, the positioning ofland uses and their adjacencies, and other character elements that define distinct neighborhoods of the city.The Neighborhood and District mapcan be a useful tool in overlaying demographic and other data to determine defined areas of need in future policy and fundingscenarios.



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, weanticipate developing a flexible model that can beadjusted 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 taxingjurisdictions;
- GRT and other employment-baseddata 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 withland 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, viewcorridors, 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 citycharacter, sector, and special area planning. Items that wewill catalogue in this assessment include:

- Urban forestry
- Streetscape composition (including materiality)
- Public art, lighting, and amenities
- Landscape
- Building height and scale
- Building articulation
- lazas 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 networkand connectivity has drastically changed. The range of mobility options, how transportationis used, and the need for more interconnectedand 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 transportationstudies 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 willbe compiled that caninclude 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 usinginnovative and interactive web-based mapping applications. These tools assist us to identify travel conditions and to verify current transportationdeficiencies 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 considerationsfor 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-lookingwater planningincluding 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. Since1995, Santa Fe has had great success in reducing water demand through conservation even witha 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 the reflects sustainable growth balanced with resource management.

WSP will identify all current utility providers (public/private)in Santa Fe, withan 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 inconsistenciesin land use and growth projections presented in the various utility plans. In addition, the WSP team will identify proposed improvements from existing utility and capita1 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 identity potential multi-benefit projects.

Our team has experience in developing utility policies that areconsistent with comprehensive plan policies. We understand how to work with existing water utilities to identify any conflicts or deficiencies in comprehensive plan policies that mayaffect successful utility planning and also identify utility policies that caninform 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 oflife, creatinga 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 safetysuch 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 Planand the General Plan Update. There are also several higher education institutions within the citysuch as private colleges and universities, public colleges and universities, and community colleges. These higher education offerings and campuses serve as important community resources and bubs but also require partnerships between the city and schools around planning topics such as quality oflife, 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 Reirnagining SFPS initiative that will also provide insight on important trends to consider when developing recommendationsand 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 Feis 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 priorityso is the importance of providing access to openspaces, 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 overlayed with relevant themes from the Santa Fe SustainabilityPlan 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 ofshared borders, species, habitats, and recreation impacts is emphasized in the Santa Fe National Forest Plan. The BLMTaos Resource Management Plan recognizes the need for coordination withSanta 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 existingand projected housing needs for all income levels, including extremely low-income households, withdocumentation 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 ofsuccess 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 housingdevelopment.
- 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 housingand 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;
- Nimbly navigating rapidly changing economic trends in ecommerce and industrial development to maximize joband 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 workwill 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 environmentallyfriendly 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. Doingso will aid the City of Santa Fe to be more environmentally conservative andconscious. Biological and habitat conversation 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 with 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 asa 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 overarcmng 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, defininggoals and objectives, and delineating long-term desired outcomes.

The outcomes and benefits of our collaborations are transformative.Theylead 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 todayand 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 bi1ls.

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 upona 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 workwith 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 deliveringfunding and projects.

Second, it is also essential that all relevant Santa Fe agencies and departments are alsoworking from a common understanding to ensurethat the vision is at the forefront and remains implementable and actionable. There are various keydepartments, 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 actedupon.

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 liesin the development of a user-friendly online portal that serves as the digital gateway to the General Plan. Leveraging Esri's cutting-edge GIS capabilitiest 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 spatialdata 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. Includedin this assessment will be determining how eJdsting 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 willgain 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 Hubsite,ensuring that the GIS system is developed in a way that provides lasting value to the cityand supports its long-term visionfor developing and sharing planningrelated 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 thesite 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 willbenefit 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 andprimary 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 work:flows 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 relatedto a given parcel. Similarly, any modifications to parcel boundaries or land use classifications will be synchronized across relevant systems to the e.rlent feasible,

Third, quality assurance measures will be implemented to validate the accuracy of updated data. This includes cross-referencinginformation with official records, conducting spot checks, and flagging discrepancies promptly. Thegoa] 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. Byprioritizing data accuracy, synchronization,and integration, WS:P 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 cityinto 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.

PUBLICENGAGEMENTPLAN

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 aroundSanta 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 re. 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 Planand 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 equityanalysis. 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, includingcreating 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/lessonslearned 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 operatingon 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 aidin 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 maylead 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 equitycommunities. 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 overlayed 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 planrequires. 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 playin 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 equitycommunities, 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.

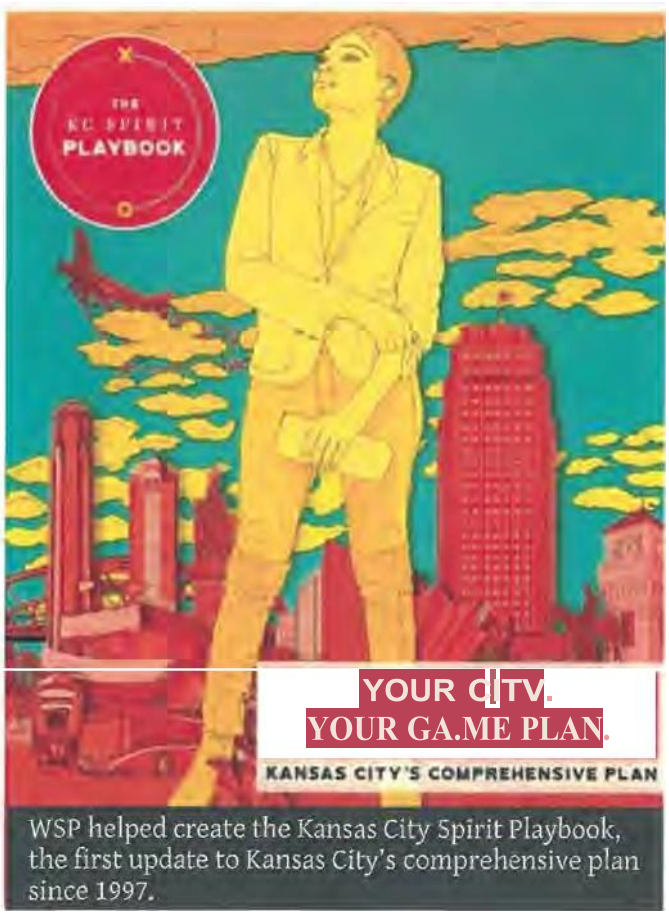
ENGAGEMENT TOOLS

Duringpreparation 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 dateon 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, keyquestions and answers, and instructions on how to facilitate the collection of valuable feedback at places people already frequent.
  Understanding that not everyone canattend a public meeting or receive a letter in the mail, we will workwith 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 boardthrough the Social Pinpoint Hub,and project team tables at existing Cityandcommunity 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 identityon 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 Cityof 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.



WSP helped create the Kansas City Spirit Playbook, the first update to Kansas City's comprehensive plan since 1997.

Iobi 3:f',1111::: n9Mf,1{1ll I ;:	General Community	Equity-focused Communities (EFC)	Organized Stakeholders	Partners	Decision-makers
STEP 1 Mobilization and Understanding	•Open house on Assessment guiding themes and findings	• Citystaff engagement • EFC led conversations • Stipend community partners support	• Citystaff engagement	•Technical Advisory Committee	• Introduction to the team and work program •Stage gate readiness review
STEP2 Vision and Goals	•Open houseon visionand goals	• City staff engagement • EFC led conversations • Stipend community partners support	• City staff engagement	•Technical .Advisory Committee	• Stage gate readiness review
STEP3 Scenario Planning	•Open house on scenarios	• City staff engagement • EFC led conversations • Stipend community partners support	• City staff engagement	•Technical Advisory Committee	• Stagegate readiness review
STEP 4 Development of Preferred PIan	• Open house on draft General Plan	• City staff engagement • EFC led conversations • Stipend community £ artners support	• City staff engagement	•Technical Adv sory Committee	• Stage gate readiness review
STEP k 5 Wor Program and Funding Plan	•Open house on work program and fundin >lan g P	•City staff engagement •EFC led conversations • Stipendcommunity partners support	• City staff engagement	•Technical Advisory Committee	• Stage gate readiness review
STEP FORWARD Governing BodyAction + Implementationand Evaluation	•Regular communication ·Online civic engagement tooI	• Citystaff engagement • EFCled conversations • Stipendcommunity partners support	• City staff engagement	• Technical Advisor.y ttee Comm.l	sta g 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 intoTask 5 efforts to ensure thorough and comprehensive communication of the communitys 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? Whatcan 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 attainin realizing the vision. A vision is a high-level narrative and graphic communication of a future desiredstate. 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 administrate 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 visionand 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 PLANNINC

SANTA FE SCENARIOS

Di/ferent 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 diversificationto also support complete corridors, increasing ridership and competitivenessfor 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 thendevelop three conceptual, thematic scenarios with placetypes applied to illustrate graphically and narratively a description of each scenario. WSP will also quantitativelyand 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 transportationand land-use planning become more and more complex, the need for better planning tools grows. Communities, stakeholders and decision-makersare demanding robust analysis these days. System dynamics helps teams organize *complex* trends and better understand their interrelationships.Wesee manytransportation agencies immediately jump to travel demand modelling (TOM) for the right answers, and unfortunately it rarely works out.TOM is great for understanding car, truckand transit travel patterns basedon 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 identifiedin Step Zcoordinated 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: Phase3

,S-

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 bein 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.

TheSmart City team will first assess what cutting-edge technologies and telecommunications infrastructure will be necessary to support each scenario. In terms of connectivity technologles, 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 infrastructureto 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 loT.

These forward-lookingapproaches 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, partlcularly the integration of connected sensors which support reporting and KPItracking 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 andexploring arts as well asduring winter ski months. Theopportunity data collection and connectivity bringsis 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

SIMPLICI1Y 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 visionand achieving its goals.

The General Plan document willintentionally be concise to facilitate ease of understanding and regular reference.The background information that went intoinforming 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 a.re 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 eachgroup, 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 willbe 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 eachgroup, coordinated with LDC
- Digital User Platform Strategic Roadmap: Phase 4

SMART CITV *VALUE-ADD*

For the General Plan document, the Smart City team will outline the requirements necessary to transition the current development pliin 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 keyinsights and pinpoint areas of improvement to define how the City can enhahce 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.

Prioritizationis 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 fundingdirectly, projects definitions and approach can be proactively aligned for competitive applications.

Deliverables:

- Internal project team charrette to outline the General Plan document
- Public communicationsand engagement materials per Table 3
- Administrativegovernance 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 ANO EVALUATION

THE FINISH LINE ANO 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 withgeneral 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, includingsupporting 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 implementationsteps
- 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: Phase6

STEP C., ONGOING: ADMINISTRATIVE COORDINATION + ENGAGEMENT AND COMMUNICATION

Using the project management plan tools developed in Step1, 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 Citystaff, 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 recentlysupported 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 bothfirms 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 VfSION, 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-makingand collaboration across these scales.

S. LOCAL PREFERENCE

STATE OF NEW MEXICO

TAXATION AND REVENUE DEPARTI\.IBNT

RESIDENT BUSINESS CERTIFICATE

Issued to: **WSP USA INC.**

OBA: **WSP USA INC.**
1 PENN PLZ 6TH FLOOR
NEW YORK, NY 10119-0002

Expires: **01-Sep-2025**

Certificate Number:

L1318621296

Stephanie Scharelln Clarke
Cabinet Secretary

THIS CERTIFICATE ISNOT TRANSFERABLE

City of Santa Fe
Treasury Department
200 Lincoln *Ave.*
Sama 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

CRS Number: 01195458002

Owner: WSP USA INC

License Number: 230545

License Type: Business License - Renewable

Issued Date: August 03, 2023

Classification: Business Registration - Standard

Expiration Date: August 03, 2024

Fees Paid: $35.00

WSPUSAINC.
2019 W GALISTEO ST UNIT M-1
SANTA FE, NM 87505

THISISNOTA CONSTRUCTION PERMIT OR SIGN PERMIT. APPROPRIATE PERMITS MUST BE OBTAINED FROM THEcny OFSANTA FE BUILDING PERMIT DIVISION PRIOR TO COMMENCEMENT OF ANY CONSTRUCTION OR THE INSTALLATION OF ANY EXTERIOR SIGN.

THISREGISTRATION/LICENSE ISNOT TRANSFERRABLE TO OTHER BUSINESSES ORPREMISES.

TO BEPOSTm IN ACONSPICUOUS rlACf

H. OTHER SUPPORTING MATERIAL

Please see the following pages for our signed Non-Collusion Affidavit and Conflict of Interest forms.

NON-COLLUSION AFFIDAVIT

Co111plete, Sign m,d Return withyollr proposal.

I hereby affirm that: I am the Senior Vice President (insert title) and the duly authorized representative of WSP USAInc. (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 fullyinformed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting suchproposal.

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 connectfon 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 Offerori 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 L--.l. ..

Printed Name Manjeet Ranu

Title Senior Vice President

Date 11/28/2023

CONFLICT OF INTEREST STATEMENT FOR CONSULTING FIRMS

Complete, sigu and return wit/1 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 I0, Article 16 NMSA J978 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 readand 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 descnbe 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 wasawareof an organizationalconflict of interest prior to theaward 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 Offerer 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 thjs finn 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. 1 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 thatanyperson 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: L,,..,_.,L

Date:
11/28/2023

Theabove 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

Contract Exhibit 3

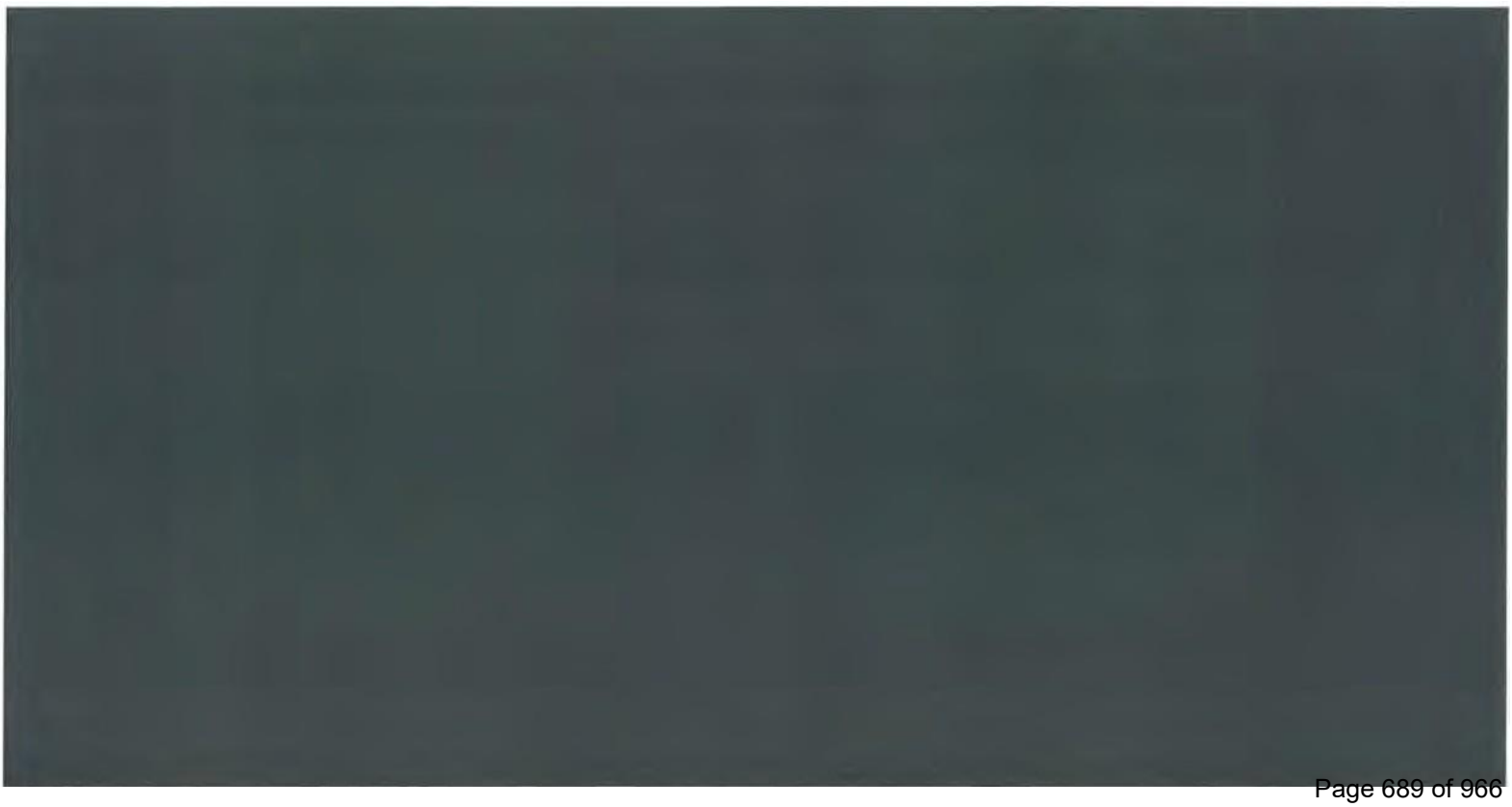
CITY OF SANTA FE
PLANNING & LAND USE DEPARTMENT

GENERAL PLAN UPDATE

COST PROPOSAL

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

EXHIBIT B



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 + 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	$748,000
FY2026	$658,000
FY2027	$289,000

wsp

EXHIBIT B

wsp

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:; ;:P:...:;;U.;;;;:Sc.;.;A,=In=c=.----------

Procurement/contract Title: ...G....e.n...e....r..a.. I.P...la.....n.. U.....p....d...auate...

Procurement Method/Vehicle: ☐Sole Source ☐State Price Agreement/Existing D

Cooperative f8lRequest For Proposals(RFP) ☐Invitation To Bid **(1TB)** ☐Exempt: 13-1-98

☐Small Purchase (Contract Under $60,000) ☐Other: _____

Requesting Department: Community Devel9pment 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	NIA	
IZI	☐	**Written Determination (srvs)**
f8l	☐	**RFP** • Confidential **info to be provided to GB by CPD Buyer**
☐	☐	1TB (include bid tab)
☐	☐	Other: _____
☐	☐	**Cooperative Agreements and GSAs and Statewide Price Agreements (include the cover page to show valid da1 page, and items to be purchased)**
f8l	☐	**Horizon Declination or Screenshot of horizonsofnewmexico.orglservices.html (srvs)**
181	☐	**Summary of Contract (only on contracts)**
181	☐	**Current Santa Fe Business Registration (or Exemption if notax)**
IZI	☐	**Executed Contract or Price Agreement (legal and contractor must sign before purchasing approves)**
☐	☐	**Chief Procurement Officer (or designee) Approval for Exempt from Procurement (use memo on our site)**
f8l	☐	**Evaluation Committee Report (RFPs only)**
☐	☐	**Signed Sole Source Determination, Vendor Written Quote, SS Letter from Contractors, and 30 Days Email**
1:81	☐	**>20k = Memo addressed to City Manager (Under 150K) Committees/City Council (Over 150K)**

YES	NIA	
1:81	☐	Quote(s) (3 Valid & Current for Over 20k)
☐	☐	BAR
181	☐	**FIR**
f8l	☐	Certificate oflnsurance (srvs)

Assistant Director, Planning & Land Use 5-16-2024

Department Point of Contact — Title — Date

Department Director — Date

Chief Procurement Officer — Date

ITT Representative — Title — Date

CoSF Version 3 12.1.2023

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.

Procurem&nl MethodNehlcle: Small Purchase ☐ RFP!t/'I /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 Counc'1I *(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. Proc r ment History:. _____

May 21, 2024

Purchasing Officer Review: Date:

Comment& Exceptions: 13-1-112. Competitive sealed proposals; request for proposals.

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

l1dj, llo1'"irq

May 21, 2024

Budget Officer Approval: Date:

Comment & Exceptions: - - -

TAXATION & REVENUE NEW MEXICO

Audit & Compliance Division
Albuquerque District

Michelle Lujan Grisham
Governor

Stephanie Scbardin Clarke
Cabinet Secretary

WSPUSAINC.
I 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 ID Issued	IDENTIFICATION NUMBER	Business Start Date
06-Dec-1983	01195458000Z-GRT	06-Dec-1983
Business Location		Business End Date
2440 LOUISIANA BLVD NE		
City and State		Zip Code
ALBUQUERQUE, NM		87110-4383
Taxpayer Name		Taxpayer Type
WSP USA INC.		Corporation
Firm Name		Filing Frequency
WSPUSAINC.		Monthly
Mailing Address		
4139 OREGON PIKE		
City and State		Zip Code
EPHRATA, PA		17522-9550

Form Revised 02

This Reglstnition Certificate is Issued pursuant to Section 7-1-12 NMSA 1978 for Gl"OSS Receipts, County Gross Receipts, and Municipal Gross Rec;eipts Taxes. This copy must be displayed consplcuously in the place of business. Any purchaser *of* the registrants business Is subject to c:ertaln requlrements under Section 7--1 1NMSA 1978.

cabinet Seaetary

By _____

Any Inquiries concemlng your Identffli;etlon Number should be addressed to the Audit & compliance Dhlislon, P.O. Box 630, Santa Fe, New Mexia, 87504•0630

THIS CERTIFICATE 15 NOT TRANSFERABLE

STATE OF NEW MEXICO TAXATION AND REVENUE DEPARTMENT
REGISTRATION CERTIFICATE

Date ID Issued	IDENTIFICATION NUMBER	Business Start Data
06-Dec-1983	01195458000Z-GRT	06-Dec-1983
Business Location		Business End Date
2440 LOUISIANA BLVD NE		
City and State		Zip Code
ALBUQUERQUE, NM		87110-4383
Taxpayer Name		Taxpayer Type
WSP USA INC.		Corporation
Firm Name		Filing Frequency
WSP USA INC.		Monthly
Mailing Address		
4139 OREGON PIKE		
City and State		Zip Code
EPHRATA, PA		17522-9550

Form Revised<12/2003

This Registration Certificate Is Issued pursuant to Section 7•1•12 NMSA 1978 *for* Gr0$$ Receipts, County Grost: RecelptS, and Municipal Gross Receipts Taxes. This copy must be Cllsplayed 00nsplcuously In the P'ace of business, Any purchaser Of the registrants busJness Is subject to certain requirements under SectiOn 7-1·61NMSA 1978,

Cabinet Secretary

By _____

Arr; Inqulrtes concerning your IdentificationNumber should be **addressed** to ttle **Audit&.** COmplance Division, P.O. Box 630, Santa Fe, New Mexico 87504-0630

THIS CERTIFICATE IS NOT TRANSFERABLE

atl:.Mv-40

102 7$06816001

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

CRS Number: 01195458002

Owner: WSP USA INC

License Number: 230545

License Type: Business License - Renewable

Issued Date: August 03, 2023

Classification: Business Registration - Standard

Expiration Date: August 03, 2024

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

TAXATION & REVENUE NEW MEXICO

Audit & Compliance Division
Albuquerque District

Mlchelle Lujan Grisham
Governor

Stephanie Schardin Clarke
Cabinet Secretary

WSPUSAINC.
1PENNPLZ6THFLO0R
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	IDENTIFICATION NUMBER	Business Start Date
06-Dec-1983	01195458002-GRT	06-Dec-1983
Business Location		Business End Date
2440 LOUISIANA BLVD NE		
City and State		Zip Code
ALBUQUERQUE, NM		87110-4383
Taxpayer Name		Taxpayer Type
WSP USA INC.		Corporation
Firm Name		Filing Frequency
WSP USA INC.		Monthly
Mailing Address		
4139 OREGON PIKE		
City and State		Zip Code
EPHRATA, PA		17522-9550

Form Revised 02/2003

This Reglstl'iltion Certific;.iireis i$sued pursuant to Section 7•1•12 NMSA 1978 for Gross Receipts, County Gross Receipts, and Municipal Gross Receipts TalCes. This copy must be displayed conspicuously in the place of business. Any purchaser *of* the registrants business Is subled: to certain requirements under Section 7·1-61NMSA 1978.

cabinet Secretary

Any lnqulrle:$ concerning your ldenUflc11tlcm Number $hould be addressed to the Audit &.compliance Division, P.O. Box 630, Santa **Fe, New** MelCICO 87504•0630

THIS CERTIFICATE 15 NOT TRANSFERABLE

STATE OF NEW MEXICO TAXATION AND REVENUE DEPARTMENT
REGISTRATION CERTIFICATE

Date ID Issued	IDENTIFICATION NUMBER	Business Start Date
06-Dec-1983	01195458002-GRT	06-Dec-1983
Business Location		Business End Date
2440 LOUISIANA BLVD NE		
ALBUQUERQUE, NM		87110-4383
WSPUSA INC,		Corporation
WSP USA INC,		Monthly
4139 OREGON PIKE		
EPHRATA, PA		17522-9550

Form Revised 02/2003

This Re;lstratlon cert1f1cate Is Issued pursuant to Section 7•1•12NMSA 1978 *for* Gr0$$ Receipts, County Gross Reulpts, and Municipal Gross Receipts Taxes. This copy must be dlspleyed conspJcuously In the pta,e of business. Any purchaser of the registrants buslne:ss Is subject to certain requirements under 5ec:ti0n 7•1-61NMSA 1978.

Cabinet Secretary

By

Arly Inquiries concerning Yollr Identification Number should be addressed tG the Audit&. Compliance Division, P.O. Bo)(630, santa Fe, New MeXico 87504-0630

THIS CERTIFICATE IS NOT TRANSFERABLE

IIIL04 v40

10297506816001

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

CRS Number: 01195458002

Owner: WSP USA INC

License Number: 230545

License Type: Business License - Renewable

Issued Date: August 03, 2023

Classification: Business Registration - Standard

Expiration Date: August 03, 2024

Fees **Paid:** $35.00

WSPUSAINC.
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**

AeRD®

CERTIFICATE OF LIABILITY INSURANCE

DATE(MMII)D/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 BEIWEEN THE ISSUING INSURER($), 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).

PRODUCER
Arthur J. Gallagher Risk Management Services, LLC
300 Madison Avenue
28th Floor
New York NY10017

CONTACT
NAME: AJG_ServiceT!_am
PHONE
1AE.C..Ji9. etl),112- 4-7020
FAX
!A/C. No!:
E-MAIL
S___ GGB.WSPUS.CertRem.iests®.aic.com

INSURER AFFQ_ROING COVERAGE — NAIC#
INSURER : Liberty Insurance Corporation — 42404
ERB:Zurich Arneri Insurance Co.!1]9-anv — 16535
INSURERC:
!!!IBO:
INSURERE:
INSURERF:

INSURED
WSP USA Inc.
One Penn Plaza
New York, NY 10119
WSPGLOB--01

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. N01WITHSTANDING 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 OFSUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BYPAIDCLAIMS.

	TYPE OFINSURANCE	ADDL/SUBR.	POLICY NUMBER	POLICY EFF	POLICY EXP	LIMITS
B	X COMMERCIAL GEN!aRALLIABILITY		GLO 9835819-11	5/1/2024	5/1/2025	EACHOCCURRENCE $ 3_,500,000
	CLAIMS-MADE 0 OCCUR					Emto
						PREMISES /Ea o rrJ>n<,!11 $3,;00,000
						MED Exp (Any oneperson) $10,0,QQ
						PERSONAL & ADV INJURY $3,500,000
	GEN'L AGGREGATE LIMIT APPLIES PER:					GENERAL AGGREGATE $7,000,00Q
	X POLICY PJRECOT LOC					PRODUCTS- COMP/OP AGG $4,000,000
	OTHER:					:S
A	AUTOMOBILELIABILITY		ASHI21-094060-034	5/1/2024	5/1/2025	Fe: TIT I NGLE LIMIT $5,000,000
	X ANY AUTO					BODILY INJURY (Per pen;on) $
	OWNED AUTOS ONLY / SCHEDULED AUTOS					BODILY INJURY (Per accident) $
	HIRED AUTOS ONLY / NON-OWNED AUTOSONLY					PROPERTY bAMAGE IPer aceidenll $
						$
	UMBRELLA LIAB OCCUR					EACHOCCURRENCE $
	EXCESS LIAS CLAIMS-MADE					AGGREGATE $
	OED RETENTIONS					$-
A	WORKERS COMPENSATION		WAZ-620-094060-014	511/2024	5/1/2025	X PER STATUTE OTH ER
A	ANOEMPLOYERS'LIABILITY YIN		WA?-620-095609-074	51112024	511/2025	
A	ANYPROPRJETOR/PARTNERIEXECUTIVE OFFICER/MEMBEREXCLUDED? 0	N/A	WC?-621-094060-914	5/112024	511/2025	E.L EACH ACCIDENT $2,000,000
	(Mandatory In NH)					E.L.DISEASE- EAEMPLOYEE $2, 000
	gilM o1gPERATIONs below					E.i..DISEASE-POLICY LIMIT S2,000,000

DESCRIPTION OFOPERATIONS/ LOCATIONS/ VEHICLES (ACORD 101, Addi!Jonal Remirks Schedule, may be attached If more space is required)
THIRTY (30} DAYS NOTICE OF CANCELLATION.
Opportunity #US-WSP-202304667 IProject Description: General Plan Update for the City of Santa Fe, New Mexico.

The City of Sante Fe their officials, officers, employees, and agents are Included as Additional Insured with respect to the General Liability policyas required by written agreement, pursuant to and subject *to* the policy's terms1 definitions, conditions and exclusions. The coverage prcv ided by the General Liabflity policy is primary and *any* other coverage shall be excess only, not contributrng. 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 polfcy'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 BECANCELLED BEFORE** THE **EXPIRATION DATE** THEREOF, **NOTJCE WILL BE DELIVERED IN ACCORDANCE WITHTHEPOLICYPROVISIONS.**

AUTHORIZEOREPRESENTAT E

© 1988-2015 ACORD CORPORATION. All rights reserved.

ACORD®

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** TH-E **POLICIES BELOW.** THIS **CERTIFICATE OF INSURANCE DOES** NOT **CONSTrTUTE A** CONTRACT **BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND** THE **CERTIFICATE HOLDER.**

IMPORTANT: If **the certificate holder** I$ **an ADDITIONAL INSURED, the policy(les)** must **have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED,** subject **to the** terms **andconditions of the policy,** certain pollcles **mayrequire** an **endorsement. A** statement on this **certificate does not** confer **rights to** the **certificate holder** In lleu of such **endorsement(s).**

PRODUCER
Arthur J.Gallagher Risk Management Services, LLC
300 Madison Avenue, 28th Floor
New York NY 10017

ict AJG Sevioe Team
!I)g o I:J..fl: 212-994-7020 Ifffc.Hol: 212-994-7074
t,4:"Jss: GGB.WSPUS.CertReq_uest@,ejQ.com

INSURERtS) AFFORDING COVERAGE	NAICf
INSURER A: OBE Specialty Insurance Comoanv	11515
INSURERS:	
INSURERC:	
INSURER 0:	
INSURERE:	
INSURERF:	

INSURED
WSP USA Inc.
One Penn Plaza
New York, NY 101f9

WSPGL0 1

COVERAGES **CERTIFICATE NUMBER:** 1520264365 **REVISION NUMBER:**

THIS IS TO CE:RTIFY 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	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY				EACH OCCURRENCE $
	CLAIMS-MADE ☐ OCCUR				DAMAGE TO RENTED PREMISES (Ea occurrence) $
					MED EXP (Any one person) $
					PERSONAL & ADV INJURY $
	GEN'L AGGREGATE LIMIT APPLIES PER:				GENERAL AGGREGATE $
	POLICY ☐ PRO-JECT ☐ LOC				PRODUCTS - COMP/OP AGG $
	OTHER:				$
	AUTOMOBILE LIABILITY				COMBINED SINGLE LIMIT (Ea accident) $
	ANY AUTO				BODILY INJURY (Per person) $
	OWNED AUTOS ONLY / SCHEDULED AUTOS				BODILY INJURY (Per accident) $
	HIRED AUTOS ONLY / NON-OWNED AUTOS ONLY				PROPERTY DAMAGE (Per accident) $
					$
	UMBRELLA LIAB ☐ OCCUR				EACH OCCURRENCE $
	EXCESS LIAB ☐ CLAIMS-MADE				AGGREGATE $
	DED RETENTION $				$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N				PER STATUTE / OTH-ER
	ANY PROPRIETOR/PARTNER/EXECL/TIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	NIA			E.L. EACH ACCIDENT $
	If yes, describe under DESCRIPTION OF OPERATIONS below				E.L. DISEASE - EA EMPLOYEE $
					E.L. DISEASE - POLICY LIMIT $
	CLAIMS-MADE				PerClaim $2,000,000
A	Professional Liability	QPL0022630	11/112023	10/31/2024	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.

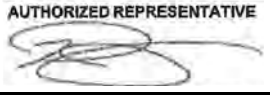
CERTIFICATE HOLDER

City of Santa Fe
200 Lincoln Ave.
Santa Fe NM 87501

CANCELLATION

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

AUTHORIZED REPRESENTATIVE



© 1988-2015 ACORD CORPORATION. All rights reserved.

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:	CBJCHBCAABAAHDe1AqnRPJ2vX8VjxxpCydrptVco68p2

"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 I 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

Email viewed by EMILY OSTER (ekoster@santafenm.gov)
2024-05-21 • 10:07:03 PM GMT- IP address: 104.47.65.254

.0o 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

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:	CBJCHBCAABAA4FZl9FNOuKMmxHi2txFBn0xVthfyAHae

"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

Powered by Adobe Acrobat Sign

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).

PRODUCER Arthur J. Gallagher Risk Management Services, LLC 300 Madison Avenue 28th Floor New York NY 10017	**CONTACT NAME:** AJG Service Team **PHONE (A/C, No, Ext):** 212-994-7020 **FAX (A/C, No):** **E-MAIL ADDRESS:** GGB.WSPUS.CertRequests@ajg.com
INSURED WSPGLOB-01 WSP USA Inc. One Penn Plaza New York, NY 10119	**INSURER(S) AFFORDING COVERAGE** / **NAIC #** **INSURER A :** Liberty Insurance Corporation — 42404 **INSURER B :** Zurich American Insurance Company — 16535 **INSURER C :** **INSURER D :** **INSURER E :** **INSURER F :**

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	X **COMMERCIAL GENERAL LIABILITY** [ ] CLAIMS-MADE [X] OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: [X] POLICY [ ] PRO-JECT [ ] LOC [ ] OTHER:	Y	Y	GLO9835819-13	5/1/2026	5/1/2027	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG 	$ 3,500,000 $ 3,500,000 $ 10,000 $ 3,500,000 $ 14,000,000 $ 7,000,000 $
A	**AUTOMOBILE LIABILITY** X ANY AUTO [ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS [ ] HIRED AUTOS ONLY [ ] NON-OWNED AUTOS ONLY			AS7-621-094060-036	5/1/2026	5/1/2027	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident) 	$ 5,000,000 $ $ $ $
	[ ] **UMBRELLA LIAB** [ ] OCCUR [ ] **EXCESS LIAB** [ ] CLAIMS-MADE [ ] DED [ ] RETENTION $						EACH OCCURRENCE AGGREGATE 	$ $ $
A A	**WORKERS COMPENSATION AND EMPLOYERS' LIABILITY** ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? **(Mandatory in NH)** Y / N: N If yes, describe under DESCRIPTION OF OPERATIONS below	N / A		WA7-62D-094060-016 WC7-621-094060-916	5/1/2026 5/1/2026	5/1/2027 5/1/2027	X PER STATUTE [ ] OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $ 2,000,000 $ 2,000,000 $ 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 Sante 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.

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

© 1988-2015 ACORD CORPORATION. All rights reserved.

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).

PRODUCER Arthur J. Gallagher Risk Management Services, LLC 300 Madison Ave 28th Floor New York NY 10017	**CONTACT NAME:** AJG Service Team **PHONE (A/C, No, Ext):** 212-994-7020 **FAX (A/C, No):** **E-MAIL ADDRESS:** ggb.wspus.certrequests@ajg.com
	INSURER(S) AFFORDING COVERAGE / **NAIC #**
	INSURER A : QBE Specialty Insurance Company — 11515
INSURED WSPGLOB-01 WSP USA Inc. One Penn Plaza New York, NY 10119	**INSURER B :** **INSURER C :** **INSURER D :** **INSURER E :** **INSURER F :**

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	
	COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☐ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☐ LOC ☐ OTHER:						EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ $ $ $ $ $
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ $ $ $
	UMBRELLA LIAB ☐ OCCUR **EXCESS LIAB** ☐ CLAIMS-MADE ☐ DED ☐ RETENTION $						EACH OCCURRENCE AGGREGATE	$ $
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y / N ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? ☐ **(Mandatory in NH)** If yes, describe under DESCRIPTION OF OPERATIONS below	N / A					☐ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $ $ $
A	Professional Liability CLAIMS-MADE			QPL0022630	11/1/2025	10/31/2026	Per Claim Aggregate	$2,000,000 $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

City of Santa Fe
200 Lincoln Ave.
Santa Fe NM 87501
USA

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

© 1988-2015 ACORD CORPORATION. All rights reserved.

Date: May 7, 2026

To: Governing Body

From: Andrea Phillips, Interim Finance Director ANDREA PHILLIPS

Andy Hopkins, Budget Office

Via: Brian Moya, Interim City Manager

RE: Fiscal Year 2026-2027 Budget – Governing Body Adoption

EXECUTIVE SUMMARY:

On behalf of the Mayor, the Finance Department requests approval of the Fiscal Year 2026-2027 Operating Budget.

BACKGROUND:

The proposed Fiscal Year 2026-2027 ("FY27") "All Funds" operating expenditures budget of $521.1 million reflects an increase of $40.6 million, or 8.4%, when compared to the Fiscal Year 2026 original budget. The proposed FY27 General Fund expenditures budget totals $176.6 million, an increase of $15.5 million, or 9.6%, from the FY26 original budget. These increases are primarily attributable to employee salary increases recommended by the Classification & Compensation Study (of which the final phase will be reflected for the full year in FY27), and to increases in the personnel budget equivalent to a 2.5% increase in salaries and salary-dependent benefits for all City employees (for union employees, the final distribution of these amounts will be subject to bargaining unit negotiations).

The attached packet includes the Proposed Fy27 Budget Book, which incorporates the FY27 Organizational Chart and the budget summaries by department, fund, and category for the Proposed FY27 Budget.

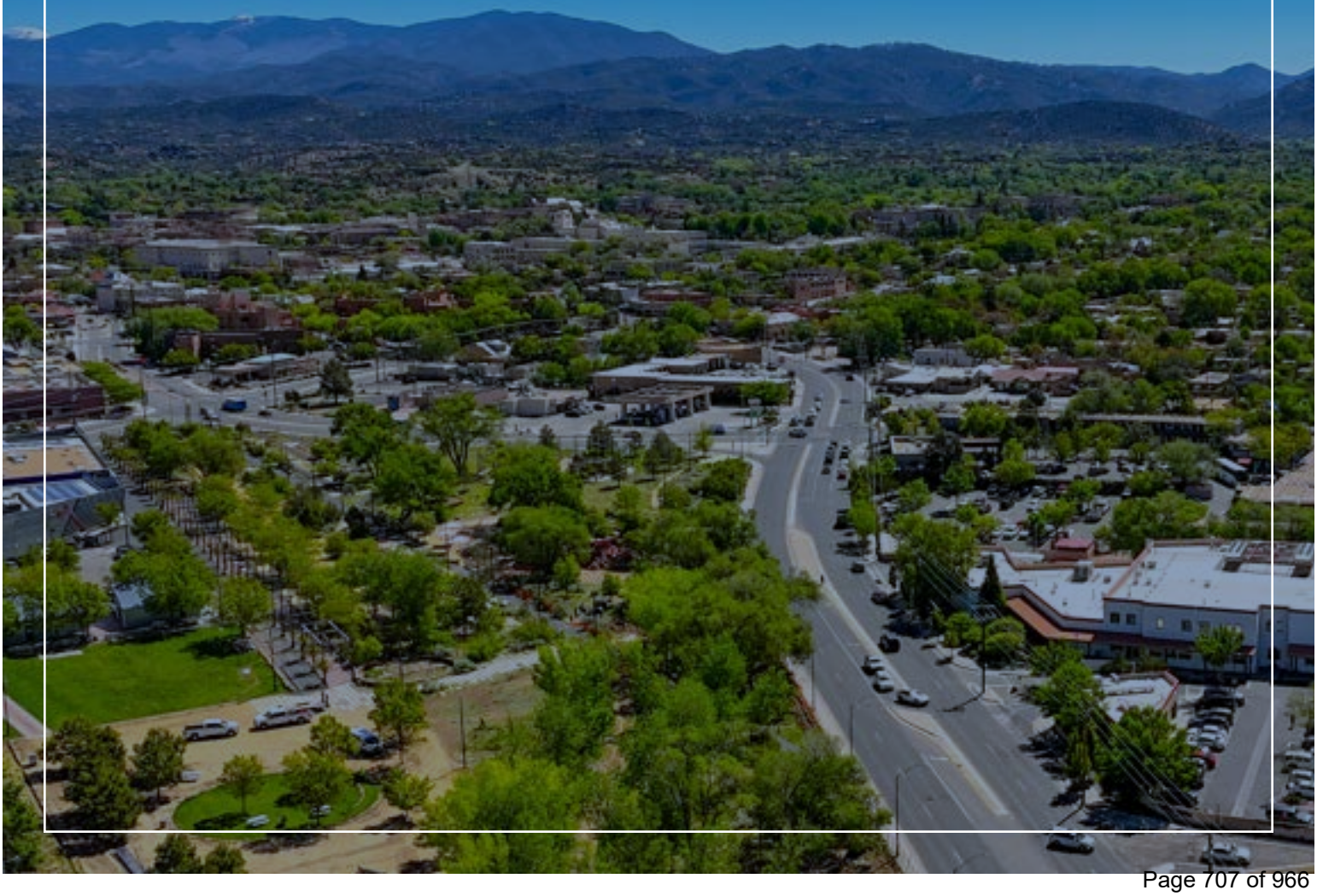
After the Governing Body's approval, the Finance Department will forward the Resolution and Operating Budget to the New Mexico Department of Finance and Administration/Local Government Division for its approval as required.

ATTACHMENTS:

Resolution
Fiscal Impact Report
Memo Attachment – Budget Book

CITY OF SANTA FE

PROPOSED FY 2026-27 OPERATING BUDGET



PROPOSED FISCAL YEAR 2027 BUDGET

TABLE OF CONTENTS

I. CITY ORGANIZATIONAL CHART 2

II. GOVERNING BODY 3

III. MAYOR'S TRANSMITTAL LETTER 4

IV. EXECUTIVE SUMMARY 8

V. DEPARTMENT EXPENDITURES 25

COMMUNITY ENGAGEMENT 25

COMMUNITY SERVICES 29

ECONOMIC DEVELOPMENT & CREATIVE INDUSTRIES 35

EMERGENCY MANAGEMENT 41

FINANCE 45

FIRE 51

GENERAL GOVERNMENT 56

HUMAN RESOURCES 66

INFORMATION TECHNOLOGY & TELECOMMUNICATIONS 69

METROPOLITAN REDEVELOPMENT AGENCY 75

PLANNING & LAND USE 78

POLICE 86

PUBLIC UTILITIES 91

PUBLIC WORKS 97

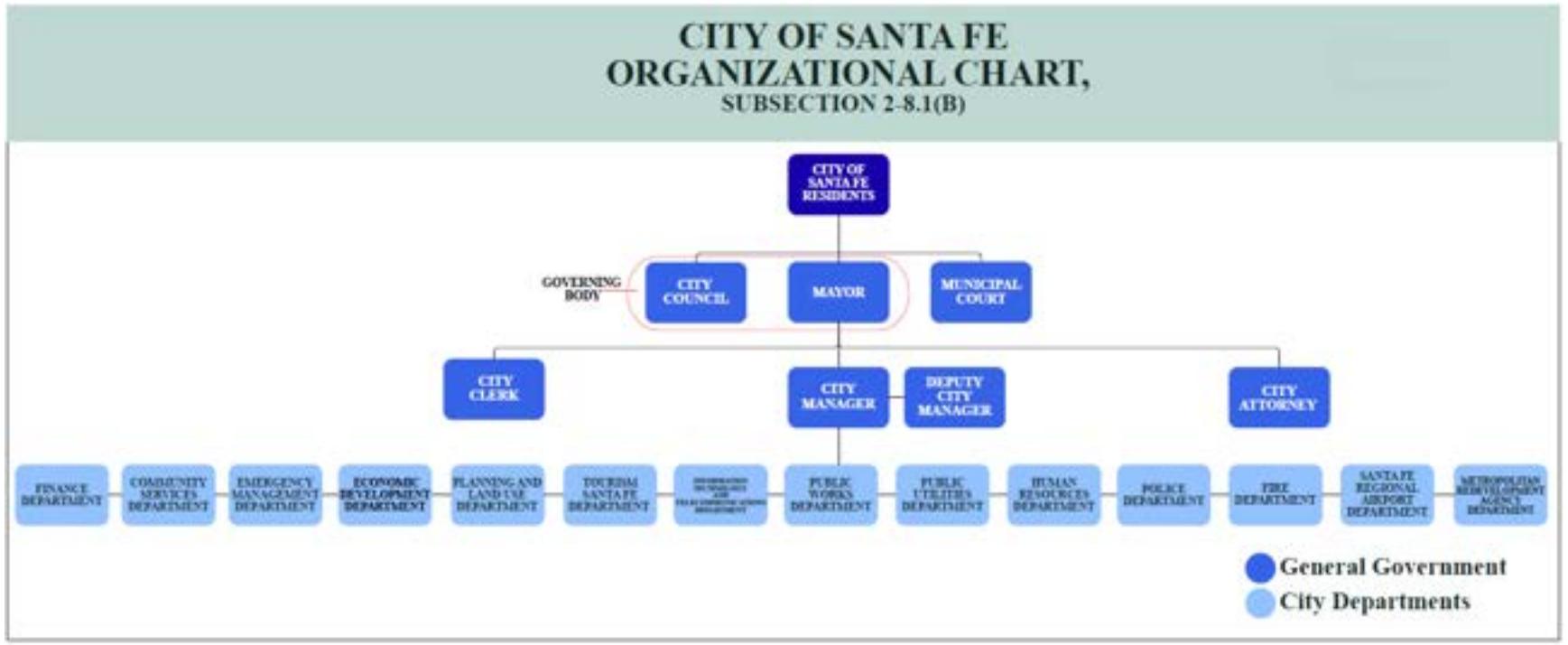
REGIONAL AIRPORT 105

TOURISM SANTA FE 108

VI. GLOSSARY OF TERMS & ABBREVIATIONS 112

APPENDIX A – ADOPTED STRATEGIC GOALS AND FY27 BUDGET PRIORITIES 128

I. CITY OF SANTA FE - ORGANIZATIONAL CHART



II. GOVERNING BODY

Mayor Michael J. Garcia

Alma Castro - District 1 Councilor

Patricia Feghali - District 1 Councilor

Elizabeth Barrett - District 2 Councilor

Paul C. Bustamante - District 2 Councilor

Pilar Faulkner - District 3 Councilor

Lee Garcia - District 3 Councilor

Jamie Cassutt - District 4 Councilor

Amanda Chavez - District 4 Councilor

Michael J. Garcia, Mayor

May 6, 2026

Dear Residents, City Councilors, City Staff and Visitors:

I am pleased to introduce the City of Santa Fe's proposed Annual Operating Budget for Fiscal Year 2026-27. This spending package represents our plan for providing municipal services in the upcoming year. As a policy document, the annual budget communicates the organization's priorities, addresses community needs and develops the work plan for City staff. The fiscal year begins on July 1, 2026 and ends on June 30, 2027. The City is working on its annual capital planning and budgeting process, which will be addressed in the coming months.

This budget incorporates the goals and objectives that were adopted by the Governing Body in February and reflects our plan to address the priorities of the Santa Fe community, within the constraints of available resources. Public input on the spending priorities was provided through a facilitated community session in January. Despite limitations and uncertainty in the future national economic outlook, the city continues to focus on providing basic services, caring for our community members, and enhancing our overall quality of life. Residents shared that housing, homelessness and parks and recreation are their top priorities, along with public safety.

Overall, the City's proposed operating budget for FY27 totals $521,144,821 across all funds. This proposed budget seeks to continue funding for basic municipal services such as police, fire/emergency medical response, streets, parks and trails maintenance, recreational programs and much more. Totaling $176,554,450, the General Fund portion of the budget is expected to increase by $15,502,844 from the FY26 original adopted budget. This represents a 9.6% increase in General Fund spending.

Not including transfers, annual revenues from all sources are anticipated to total $433,896,183, an increase of $32,151,490 or 8% from the original FY26 budget. Approximately 41.1% of this funding is derived from gross receipts tax. While revenues continue to rise each year, City staff continue to watch this source closely, as it can be highly variable. Staff are reviewing options for other revenue streams and will continue to provide options for elected officials and leadership on opportunities to diversify and enhance these resources to provide better services for our community. Other resources that fund city operations include the lodging tax, which is charged on hotels, motels and short-term rentals. This revenue source funds marketing for tourism, convention center management, and arts and cultural events and programming. Utility services such as water, wastewater and waste removal and recycling are provided through fees charged to utility customers. Reasonable utility rate increases will raise funds for investment in this critical maintenance responsibility and provide opportunities for water conservation and management and improvements to the city's wastewater reclamation facility.

City Council

Alma G. Castro, District 1
Patricia Feghali, District 1
Elizabeth "Liz" Barrett, District 2
Paul C. Bustamante, District 2
Lee Garcia, Mayor Pro Tem, District 3
Pilar F.H. Faulkner, District 3
Jamie Cassutt, District 4
Amanda Chavez, District 4

Support for Public Safety

The City will continue efforts to enhance the safety and well-being of residents, visitors and businesses. Through additional spending on police, fire and emergency management in the coming year, and the strategic use of technology, collaboration and planning, we will make our community a better place to live, work and play. The Governing Body's adopted Strategic Goal, "**work to reduce crime and increase public safety**", incorporates the aims of ensuring safer streets, crosswalks and corridors, noise and speed enforcement to reduce traffic and pedestrian accidents and to enhance quality of life, strategic policing efforts to reduce crime and ensure public safety, and investments in bike infrastructure. The General Plan and the next phase of the Land Use and Development code rewrite will contemplate street infrastructure and multimodal opportunities that enhance walkable, bikeable and safer streets for all. Automatic traffic enforcement is planned for key areas across the city, which will slow traffic and address quality of life nuisances such as noisy mufflers and modified exhaust systems.

The two largest non-enterprise fund departments in the city are the Police and Fire Departments. These crucial departments employ 452 full-time employees (or nearly one-third of the city's workforce). Both Departments' budgets will increase by 14.1% (Fire Department) and 13.6% (Police Department) in FY27. The city will support new cadets for both forces next year, which will bring a new class of trained emergency responders into the city's forces.

Emergency Management is now a stand-alone department reporting directly to the City Manager. This office was previously managed under the Community Health and Safety Department. In FY27, additional staff and contracts will be utilized to enhance public safety planning, preparedness and response.

These teams provide life-saving measures, crime prevention and response, and planning support to keep the Santa Fe community safe.

Investing in City Employees

This budget continues to support the people who serve our community. In Fiscal Year 2027, the City will ensure ongoing support of our most important resource - our employees. The proposed budget anticipates adding 14 new full-time employees in key positions, including eight union employees represented by the Fire, Police and AFSCME bargaining units. Salaries and benefits for a total of 1,643.5 full time equivalent employees are funded across 16 city departments and multiple funds. In addition to outward-facing programs and services in Public Works, Utilities, and the Santa Fe Regional Airport, employees in Finance, Information Technology, Human Resources and Administration/General Government support other departments in achieving their missions. These crucial departments provide overall management and support of the city organization. More than two-thirds of the city's workforce is represented by the Fire, Police and AFSCME bargaining units.

Maintenance of our beautiful open spaces, parks, trails, medians, and arroyos is a crucial component of city operations. In FY27, the budget will expand our parks maintenance capabilities by adding seven (7) new Parks positions. This crew will include a Superintendent and six (6) parks maintenance workers (including one senior). This will reduce the Parks Division's reliance on contracted maintenance over time.

Our new Conservation and Sustainability Division within the Public Utilities Department includes ten employees. This new division combines positions from other divisions where sustainability initiatives such as water conservation, recycling/waste diversion and Keep Santa Fe Beautiful are being implemented.

In addition to funding the final phase of the class and compensation study's compensation recommendations, which adjusted employee wages across the city in 2025 and 2026, the operating budget provides funding for an across-the-board salary adjustment equivalent to two and a half percent. The City will also absorb the projected increase in health insurance premiums without passing on any increase to employees. In addition to Public Employee Retirement Association (PERA) benefits (retirement plan), the city supports employees by providing a generous benefits package including life, dental and vision insurance and retiree health care premiums. Funding is available in the budget for both internal and external professional development opportunities to allow employees to not only meet the requirements of their job, but to grow and learn personally and professionally. Additional benefits for City employees continue in FY27 such as paid holidays, paid sick and vacation leave time, and employee wellness programs.

The City provides dozens of employee training courses per year, a tuition reimbursement program, professional certificates, membership in professional development organizations and conference learning opportunities. Career ladders have been developed for utility operators and other positions throughout the organization to allow the city to "grow its own" experienced professionals in many areas. The City of Santa Fe strives to be an employer of choice in the region, with an excellent reputation for employee growth, development and satisfaction.

Making City Government Work Better

The City will **keep investing in improving city systems and infrastructure to ensure efficient and effective use of city resources, which will enhance service delivery and customer service**. This Governing Body goal is an ongoing, comprehensive area of focus and effort by City leadership. The City must find ways to work smarter, better, and faster for constituents. When the City functions well and employees can utilize the right tools, our customers receive better service. Recently, the City reorganized some departments to provide a more streamlined reporting structure to the City Manager. In partnership with our three bargaining units, the administration is evolving job duties to meet growing community needs. The City's budget includes funding for software programs and tools that will modernize our processes and allow for data-driven decision making. Departments are working to improve internal processes, evaluate and implement best practices and train staff.

Strategic funds totaling $11.9 million have been set aside in the budget for maintenance and investment in facilities, vehicles, equipment and capital needs. Investment in these critical areas will ensure that employees are working in clean, safe and modern vehicles and facilities, and that the City will have a critical reserve for unforeseen and emergency capital needs.

Supporting Housing Opportunities for All

As the city grows and national and local socio-economic conditions evolve, the need for housing of all types continues. In addition, local governments are being tasked with doing more for our vulnerable residents who are experiencing homelessness. To this end, the Governing Body adopted a third strategic

goal and budget priority: **support development of more housing across the continuum of needs, with a focus on affordable and attainable housing, including support for wrap-around services.** The FY27 operating budget maintains funding for six positions in the Affordable Housing Division within the Planning and Land Use Department, and additional homelessness support staff within the Community Services Department. The Affordable Housing Trust Fund will see another infusion of three million dollars from the General Fund in FY27, which will provide additional resources towards this key initiative. Funds will be leveraged to encourage development of more housing units, and provide housing support to low-income residents. Addressing homelessness and housing opportunities requires strategic investment with our community partners. Substantial operational support for providers of housing support services is included within this budget.

I look forward to discussions on the proposed budget and continued partnerships with the City Council, City staff, and residents to achieve a better Santa Fe.

In service,

Michael J. Garcia
Mayor

IV. EXECUTIVE SUMMARY

The proposed FY27 budget was developed in a revamped, streamlined process that involved a greater level of input from City staff, the Mayor and the City Council in order to set a fiscally sustainable course for the City of Santa Fe, while investing in shared priorities to deliver exceptional services and build a better city for Santa Feans.

On January 8, 2026, a Civic Engagement meeting was held at the City's Convention Center, in which members of the public were invited to offer their ideas for the improvement of City service delivery, and to list their priorities for City services from lowest to highest. On January 23, the Governing Body conducted a study session with key City staff to analyze the results from the Civic Engagement meeting and to set their priorities for the FY27 budget, giving City staff a guide for the targeting of strategic financial investments to reflect these priorities. The FY27 budget development process took these inputs to heart, and the result is a proposed budget that better reflects the goals and desires of City residents and the Governing Body.

One example of this effort is reflected in the Affordable Housing Division, wherein the Affordable Housing Trust Fund (AHTF), which was previously subsumed within the larger Community Development Fund, was separated out into its own separate fund to enable better tracking of allocated resources and targeted housing services objectives. This process was reinforced by the aforementioned Civic Engagement meeting and the Governing Body study session, which reaffirmed housing as a high priority and key service area for the City's residents and elected Council representatives. The proposed FY27 budget takes this input into account and further enhances the City's strategic investment in housing support services, including the ongoing transfer of $3 million annually from the City's General Fund to the AHTF. These funds help to support a variety of housing services, including development or renovation of housing units, homeownership support services, direct subsidies for low-income renters, and downpayment assistance for low- and moderate-income homebuyers in the City. The proposed budget also includes funding for citywide housing planning services. In total, the proposed FY27 budget incorporates an investment of $4.7 million in these services, with the majority of these resources coming from the $3 million allocation of General Fund dollars to the AHTF.

Proposed FY27 Budget - Expenditures

The proposed FY27 budget meets the City's financial obligations, including the fourth and final phase of employee salary increases as recommended by the Classification and Compensation Study, and leverages the City's resources into shared goals. The proposed budget also includes a significant increase in funding for public safety, allocating an

additional $10.9 million, or 13.8%, over the original FY26 budget for the Emergency Management, Fire and Police Departments. The proposed FY27 all funds expenditures budget of $521.1 million reflects an increase of $40.6 million, or 8.4%, when compared to the FY26 original budget. The proposed FY27 General Fund expenditures budget totals $176.6 million, an increase of $15.5 million, or 9.6%, from the FY26 original budget. These increases are primarily attributable to investments in the City's workforce, as detailed below.

Investing in a Compensation Package for the City's Workforce

The City's Classification & Compensation Study was completed in December 2023; the proposed FY27 budget reflects the completed implementation of the recommendations provided by that study. This implementation has occurred in stages. The first stage, bringing all employees up to the minimum of their recommended pay grades as well as the first 25% of the study's recommended total salary increases (known collectively as "hybrid parity"), took effect in March 2024. The second phase of hybrid parity took effect in January 2025. Two more phases of parity increases were implemented in FY26, beginning with phase three, which went into effect in July of 2025; the fourth and final phase was implemented in December of 2025. FY27 will mark the first fiscal year in which all phases of the Classification & Compensation Study's recommendations will be in effect for the full fiscal year. The study updated the job grades to market levels, enabling positions to be hired at current market rates. The people who work for the city make extraordinary efforts to keep Santa Fe functioning, and have implemented ideas and initiatives to create a more efficient City government. This has resulted in improvements to city operations, and more positive citizen experiences with City services. The combined total cost of these increases in the proposed FY27 budget (including the recurring impact of past increases that originally went into effect starting in FY25) is $12.6 million.

The proposed FY27 budget also includes an allocation of $4 million to fund the equivalent of 2.5% increase in salary and salary-dependent benefits for all City employees. This compensation package includes:

- A collective bargaining reserve for American Federation of State, County and Municipal Union (AFSCME) employees totaling $1,550,886 in salaries and salary-dependent benefits across all city departments; compensation for members of AFSCME Local 3999 will be allocated through the collective bargaining process.

- A budgeted increase for Fire Union personnel totaling $466,866 in the Fire Department's budget, reflecting the equivalent of a 2.5% salary/benefits increase in FY27 for all Fire Union personnel; compensation for members of the IAFF Local 2059 will be allocated through the collective bargaining process.

- A collective bargaining reserve for Police Union personnel in the Police Department's budget totaling $508,985, reflecting a 2.5% salary/benefits increase in FY27 for all Police Union personnel; compensation for members of the Santa Fe Police Officer's Association (SFPOA) will be allocated through the collective bargaining process.

- A budgeted increase for non-union personnel totaling $1,461,602 across all City departments' budgets, reflecting a 2.5% salary/benefits increase in FY27 for all non-union personnel.

Investing in New Positions and Position Changes to Meet Critical Needs

Mayor Garcia has set a goal to improve the efficiency of City service delivery by allocating funding to new positions and gradually phasing out the practice of contracting outside parties to perform needed tasks at a higher overall cost. While this process will be ongoing for years to come, the proposed FY27 budget offers a strong start to this effort by investing in new positions in key areas, including:

- Two (2) new positions and associated equipment in the Constituent Services Division, including a Broadcast and Streaming Production Specialist to schedule, facilitate, and produce the public-facing online components of all meetings held in the Council Chambers, and a Translator that was converted from a part-time to a full-time position for FY27, which will support effective written and oral communication with Spanish-speaking constituents, vendors and community members.

- Two (2) new Project Manager positions and associated equipment in the Economic Development Division, funded primarily by freezing the Community Development Director position.

- Reclassification of one (1) Emergency Management Coordinator position to an Assistant Director position in the Emergency Management Department, funded in part by a reduction to the Department's contractual services budget.

- An allocation of $250,000, which was set aside for legislative support staff in the City Council's contractual services budget, pending a final determination of the positions' job duties, salary levels and budgetary impact.

- One (1) new Information Systems Manager position and associated equipment in the Human Resources Department to enable the City to maximize the Tyler Human Capital Management (HCM) system's capabilities, enhance efficiency and reduce the Department's reliance on outside contractors.

- Two (2) new positions in the Metropolitan Redevelopment Agency (MRA), including an Administrative Manager and a Project Manager and associated equipment, to assist with the MRA's growing responsibilities.

- Two (2) new Project Manager positions and associated equipment in the Affordable Housing Division, and one (1) re-funded/unfrozen Engineer position in the Technical Review Division, to assist with the Planning & Land Use Department's service delivery efforts and ongoing initiatives.

- One (1) new Public Information Officer position and associated equipment, plus one (1) Public Records Specialist that was transferred from the City Attorney's Office, to enhance the Police Department's ability to comply with Inspection of Public Records Act (IPRA) requirements, meet statutory deadlines, reduce backlog, and uphold the highest standards of transparency and accountability.

- A new Parks crew, comprising seven (7) positions (one Parks Superintendent, two Parks Maintenance Worker Seniors, and four Parks Maintenance Workers) and associated equipment, which is intended to address the need for vegetation management, particularly in the city's medians, and homeless encampment cleanups; because much of this function is currently performed by contracted labor, the cost of the crew was partially offset by a reduction of $200,000 in contractual services, which will allow the Division to transition from the current contracted service to in-house service delivery without significant disruption.

- Reclassification of two (2) positions to better address changing personnel needs at the Santa Fe Regional Airport; this includes the reclassification of an Airport Shuttle Driver position to an Airport Security Officer position, and the reclassification of a Custodian position to a Mechanic Supervisor I position.

- One (1) new Assistant Operations Manager and associated equipment in the Tourism Department to address critical operational needs at the Santa Fe Convention Center.

Investing in Strategic Reserves

The proposed FY27 budget is a fiscally responsible annual financial plan that also provides funding to be set aside for strategic reserves or "rainy day funds.' These reserves will help the City to successfully navigate future unforeseen circumstances, emergency needs and national, regional and local economic disruptions, and include:

- A strategic reserve totaling $1.5 million for future needs and currently-unforeseen critical repairs in the City's vast and widespread array of facilities,

- A strategic reserve of $1.5 million for critical vehicle and equipment replacement needs, and

- A capital reserve of $8.9 million for future capital improvement needs, including both emergency and non-emergency capital projects.

Proposed FY27 Budget - Revenues

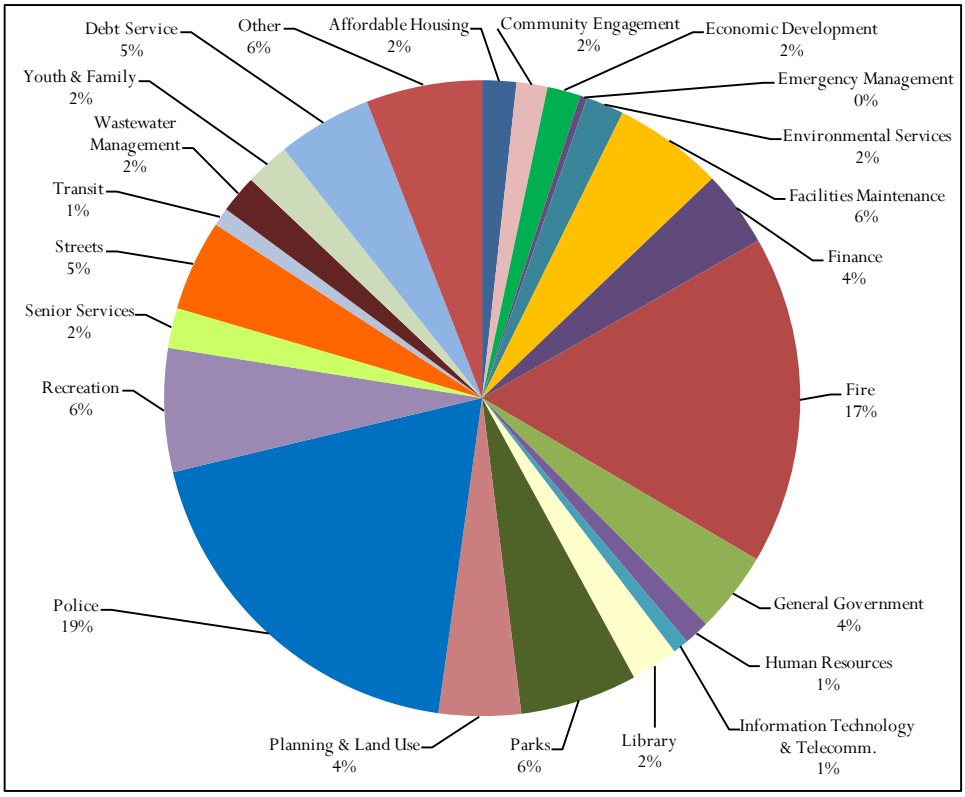
The largest single source of revenue to the City is Gross Receipts Tax (GRT), which represents 34.8% of total budgeted operating City revenue, and is estimated to contribute $178.5 million to the City's revenue portfolio in FY27. This represents a projected increase of $11.1 million or 6.7% over the original FY26 budget amount of $167.4 million. While GRT growth in the current year (FY26) has remained a positive number, year-over-year growth has shown definitive signs of leveling off. Thus, this estimate, which was developed in collaboration between the City's Budget Division and Reilly White, PhD, Associate Dean and Professor of Finance at the University of New Mexico (UNM) Anderson School of Management, is deliberately conservative, reflecting current economic uncertainties.

Overall, the revenue picture for all City funds is a positive one, thanks in part to a directive by the City's Mayor and senior administrative staff for all departments to evaluate any self-generated revenues that have not been adjusted to keep up with inflation in several years, or in some cases, decades. Further changes to the City's fees and other service charges may be recommended to the Governing Body in the near future as the City continues a comprehensive in-depth analysis of revenue sources across all departments and funds. For FY27, total revenues for all City funds are estimated at $513 million, an increase of $31.4 million or 6.5% over the original FY26 budgeted amount.

The GRT revenue outlook for the General Fund is quite similar to the overall picture, though GRT represents a proportionally much larger share of the proposed FY27 General Fund revenue budget, at 62.9%. General Fund GRT revenue is projected to total $111.1 million for FY27, an increase of $6.3 million or 6% over the original FY26 budget. Once again, this is a conservative estimate, and provides the primary driver for the total General Fund revenue outlook. Overall, the proposed FY27 General Fund revenue budget is $176.6 million, an estimated increase of $15.5 million, or 9.6%, from the original FY26 budget.

PROPOSED FISCAL YEAR 2027 BUDGET

WHAT DO MY TAXES* PAY FOR?



	FY 27 Proposed Budget
Affordable Housing	$3,348,125
Community Engagement	3,013,794
Economic Development	3,289,739
Emergency Management	669,528
Environmental Services	3,717,044
Facilities Maintenance	10,799,365
Finance	7,491,747
Fire	32,272,653
General Government	7,969,497
Human Resources	2,500,402
Information Technology & Telecomm.	1,549,715
Library	4,637,904
Parks	11,516,356
Planning & Land Use	8,049,415
Police	36,806,415
Recreation	12,125,199
Senior Services	3,935,087
Streets	8,919,607
Transit	1,785,049
Wastewater Management	3,717,044
Youth & Family	4,334,024
Debt Service	9,275,539
Other	11,416,351
TOTAL	**$193,139,599**

**Including Gross Receipts Tax and Property Tax*

PROPOSED FISCAL YEAR 2027 BUDGET

ALL FUNDS SUMMARY

CITY OF SANTA FE
ALL FUNDS - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Local/State-Shared Taxes:							
-Gross Receipts Tax	158,080,046	169,534,967	173,964,469	167,400,000	178,537,742	11,137,742	6.7%
-Property Tax	12,149,080	12,502,649	12,767,886	13,171,757	14,601,857	1,430,100	10.9%
-Franchise Fees	5,668,146	5,291,041	5,418,561	5,647,741	5,586,036	(61,705)	-1.1%
-Lodgers' Tax	19,948,448	16,229,165	17,923,699	18,000,001	18,128,020	128,019	0.7%
-Gasoline Tax	1,561,558	1,631,126	1,452,729	1,680,000	1,587,951	(92,049)	-5.5%
-Other Taxes	1,206,662	1,304,150	1,240,722	1,308,468	1,263,170	(45,298)	-3.5%
Subtotal - Taxes	*198,613,941*	*206,493,099*	*212,768,067*	*207,207,967*	*219,704,776*	*12,496,809*	*6.0%*
Licenses & Permits:							
-Business Licenses	912,765	758,008	751,396	816,300	691,827	(124,473)	-15.2%
-Building/Zoning Permits	3,945,947	4,790,704	4,214,670	3,155,000	3,755,000	600,000	19.0%
-Other Licenses & Permits	171,689	141,734	184,559	155,000	182,126	27,126	17.5%
Subtotal - Licenses & Permits	*5,030,400*	*5,690,446*	*5,150,625*	*4,126,300*	*4,628,953*	*502,653*	*12.2%*
Fees & Service Charges:							
-Airport Fees	2,051,120	2,156,373	3,446,571	5,002,630	6,378,000	1,375,370	27.5%
-Ambulance Fees	4,649,371	3,820,330	7,362,487	5,114,308	5,887,781	773,473	15.1%
-Civic Center Fees	629,296	416,855	785,551	583,000	895,000	312,000	53.5%
-Housing Fees	978,427	1,608,969	1,431,062	877,540	833,000	(44,540)	-5.1%
-Impact Fees	2,574,677	4,286,993	1,558,901	3,827,254	4,478,138	650,884	17.0%
-Insurance Premiums	27,542,821	32,828,591	34,095,408	32,798,891	35,145,184	2,346,293	7.2%
-Meals Fees	80,247	65,244	57,989	77,400	77,400	-	0.0%
-Parking Fees	3,918,405	4,843,050	4,883,143	5,150,500	5,450,000	299,500	5.8%
-Planning/Land Use Fees	449,523	165,009	1,162,565	694,500	540,200	(154,300)	-22.2%
-Police/Court Fees	626,617	592,138	904,166	474,392	561,403	87,011	18.3%
-Public Transportation Fees	229,089	238,753	219,315	235,500	249,630	14,130	6.0%
-Recreation Fees	2,204,704	3,096,693	3,702,744	3,357,349	3,403,150	45,801	1.4%
-Solid Waste Fees	15,473,829	16,147,451	16,685,357	16,550,529	15,514,942	(1,035,587)	-6.3%
-Wastewater Fees	18,476,058	15,154,599	15,004,927	13,993,545	14,061,673	68,128	0.5%
-Water Fees	35,764,431	43,710,877	38,642,717	37,727,253	37,870,396	143,143	0.4%
-Reimbursed Expenses	14,880,751	21,359,460	22,944,169	23,694,431	34,510,057	10,815,626	45.6%
-Other Fees/Services	755,503	3,587,030	3,968,337	3,918,896	3,716,021	(202,875)	-5.2%
Subtotal - Fees & Services	*131,284,868*	*154,078,417*	*156,855,409*	*154,077,918*	*169,571,975*	*15,494,057*	*10.1%*
Fines & Forfeitures:							
-Parking Fines	533,465	460,469	448,621	525,000	525,000	-	0.0%
-Violations Fines	16,271	16,647	10,779	16,653	16,653	-	0.0%
-Other Fines & Forfeitures	190,220	155,698	120,448	153,750	153,450	(300)	-0.2%
Subtotal - Fines & Forfeitures	*739,956*	*632,815*	*579,848*	*695,403*	*695,103*	*(300)*	*0.0%*

[Continued next page]

CITY OF SANTA FE
ALL FUNDS - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
[Revenues by Category - continued]							
Rents/Royalties/Concessions:							
-Airport Rentals	(5,599)	(112,796)	68,959	170,000	400,600	230,600	135.6%
-Equipment Rentals	34,269	25,553	21,653	27,000	27,000	-	0.0%
-Parks & Recreation - Rentals	283,510	295,116	250,831	302,750	302,750	-	0.0%
-Other Rentals	2,435,262	3,018,972	2,152,001	3,753,635	3,185,608	(568,027)	-15.1%
Subtotal - Rents/Royalties	*2,747,441*	*3,226,844*	*2,493,443*	*4,253,385*	*3,915,958*	*(337,427)*	*-7.9%*
Miscellaneous Revenues:							
-Insurance Recoveries	6,971	96,659	-	100,000	100,000	-	0.0%
-Sales Revenue	698,130	1,090,468	1,426,691	1,322,024	112,840	(1,209,184)	-91.5%
-Other Misc. Revenue	4,138,531	2,309,196	(1,461,974)	4,959,688	6,853,574	1,893,886	38.2%
Subtotal - Miscellaneous	*4,843,631*	*3,496,323*	*(35,282)*	*6,381,712*	*7,066,414*	*684,702*	*10.7%*
Intergovernmental Grants:							
-State Grants	4,675,031	4,668,053	8,944,961	5,479,143	6,427,469	948,326	17.3%
-Federal Grants	4,216,318	8,878,828	11,340,342	4,312,383	7,170,773	2,858,390	66.3%
-SF County Grants	(12,144)	70,487	478,364	244,698	252,092	7,394	3.0%
-Other Grants	10,000	20,000	228,223	-	1,642,023	1,642,023	N/A
Subtotal - Intergovernmental	*8,889,205*	*13,637,368*	*20,991,891*	*10,036,224*	*15,492,357*	*5,456,133*	*54.4%*
Interest on Investments	1,880,058	11,977,762	15,608,940	14,965,784	12,820,647	(2,145,137)	-14.3%
Transfers In	54,330,427	68,494,322	86,446,134	79,777,933	79,070,300	(707,633)	-0.9%
TOTAL REVENUES	**408,359,928**	**467,727,396**	**500,859,075**	**481,522,626**	**512,966,483**	**31,443,857**	**6.5%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

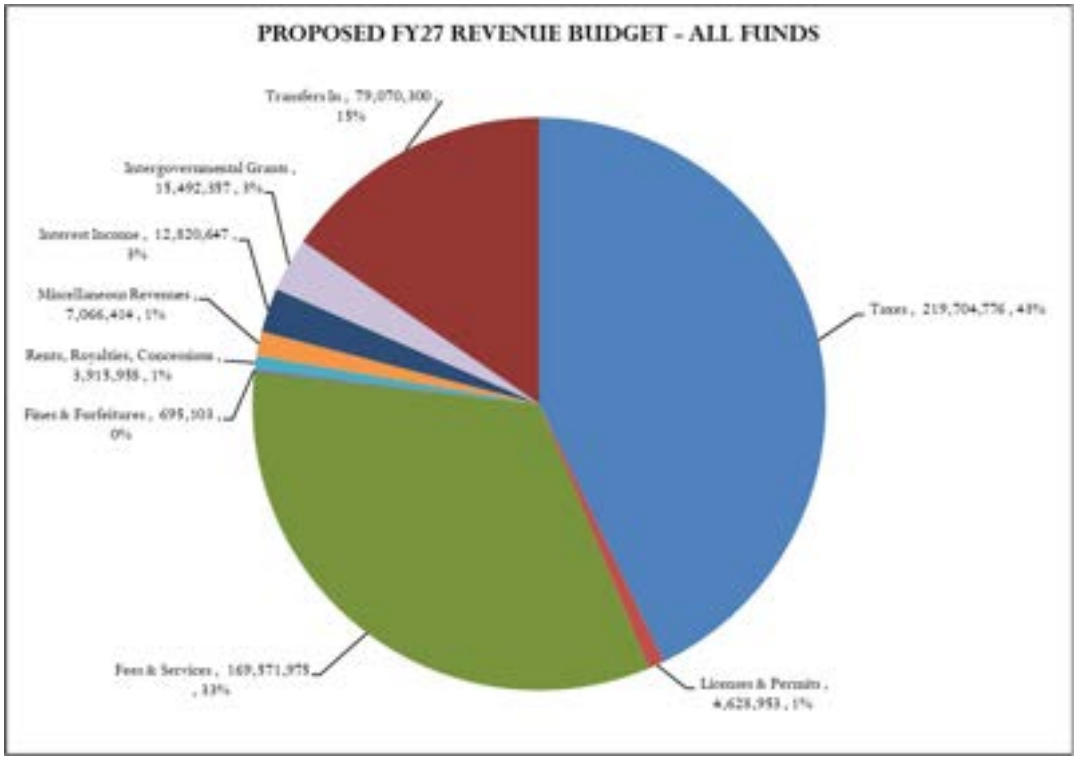
PROPOSED FISCAL YEAR 2027 BUDGET

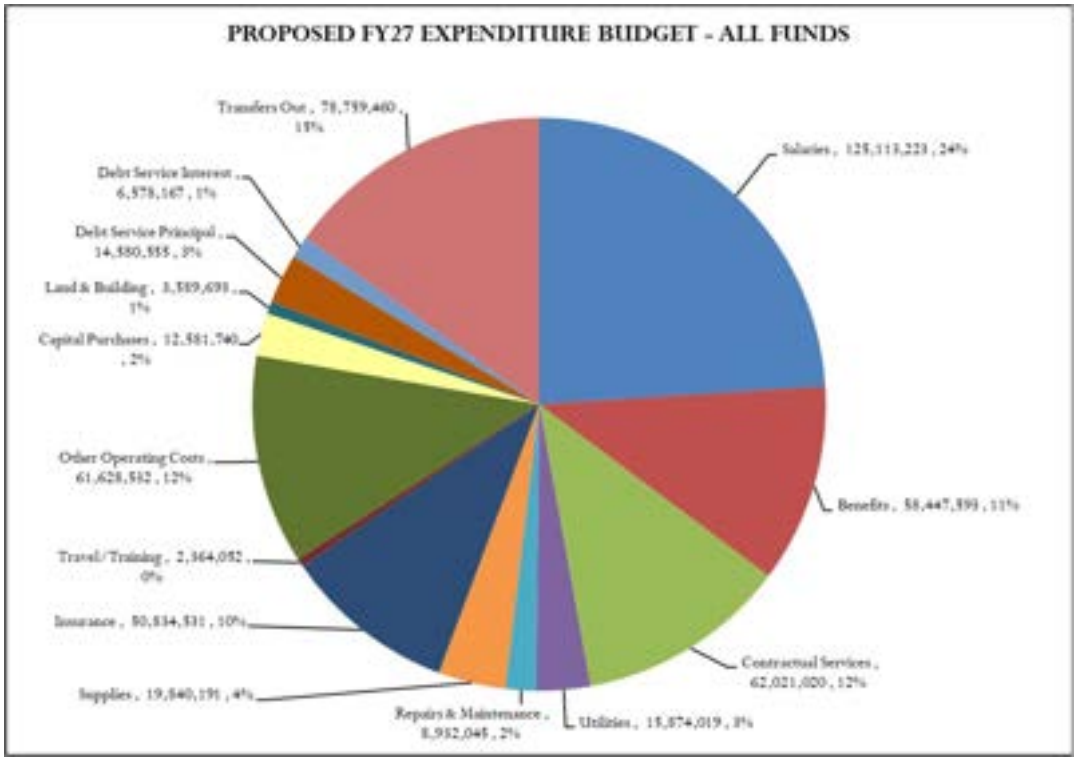
CITY OF SANTA FE
ALL FUNDS - EXPENDITURES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Personnel Services:							
-Salaries	87,006,557	94,031,822	104,388,361	114,831,571	125,113,223	10,281,652	9.0%
-Benefits	25,923,600	42,861,499	49,165,065	55,459,448	58,447,593	2,988,145	5.4%
Subtotal - Personnel Services	*112,930,157*	*136,893,321*	*153,553,426*	*170,291,019*	*183,560,816*	*13,269,797*	*7.8%*
Operating Expenses:							
-Contractual Services	33,117,885	39,728,204	42,813,653	49,028,138	62,021,020	12,992,882	26.5%
-Utilities	14,259,390	14,607,707	14,642,568	16,763,777	15,874,019	(889,758)	-5.3%
-Repairs & Maintenance	7,213,214	6,973,357	7,896,216	10,321,906	8,932,045	(1,389,861)	-13.5%
-Supplies	12,229,321	12,434,704	13,979,996	15,718,939	19,840,191	4,121,252	26.2%
-Insurance	31,911,781	38,610,663	40,520,644	47,887,157	50,834,531	2,947,374	6.2%
-Travel/Training	1,075,678	1,185,636	1,448,718	1,854,329	2,364,052	509,723	27.5%
-Other Operating Costs	54,112,499	63,364,261	62,938,270	51,633,782	61,628,532	9,994,750	19.4%
Subtotal - Operating Expenses	*153,919,768*	*176,904,532*	*184,240,065*	*193,208,028*	*221,494,390*	*28,286,362*	*14.6%*
Capital Outlay:							
-Capital Purchases	159,528	9,550,555	11,431,827	10,890,068	12,581,740	1,691,672	15.5%
-Land & Building	960,535	3,456,527	5,686,821	3,306,443	3,589,693	283,250	8.6%
Subtotal - Capital Outlay	*1,120,062*	*13,007,082*	*17,118,648*	*14,196,511*	*16,171,433*	*1,974,922*	*13.9%*
Debt Service:							
-Principal	8,250,699	8,916,053	9,221,175	16,476,768	14,580,555	(1,896,213)	-11.5%
-Interest	8,179,800	7,412,736	6,735,646	6,084,329	6,578,167	493,838	8.1%
-Other Debt Service	(970,457)	(825,913)	(680,358)	-	-	-	N/A
Subtotal - Debt Service	*15,460,042*	*15,502,877*	*15,276,463*	*22,561,097*	*21,158,722*	*(1,402,375)*	*-6.2%*
Transfers Out	63,855,814	83,144,147	111,814,252	80,332,737	78,759,460	(1,573,277)	-2.0%
TOTAL EXPENDITURES	**347,285,844**	**425,451,958**	**482,002,854**	**480,589,392**	**521,144,821**	**40,555,429**	**8.4%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

PROPOSED FISCAL YEAR 2027 BUDGET





PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
ALL FUNDS - EXPENDITURES BY DEPARTMENT
FY 2022/23 THROUGH FY 2026/27

DEPARTMENT	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Community Engagement	2,468,480	2,796,069	2,716,823	3,827,614	3,645,850	(181,764)	-4.7%
Community Services	25,811,343	33,840,445	42,646,397	40,308,146	42,874,349	2,566,203	6.4%
Economic Development	5,924,665	7,569,183	11,536,605	7,984,187	8,952,581	968,394	12.1%
Emergency Management	430,590	542,307	560,952	948,098	1,103,460	155,362	16.4%
Finance	25,294,836	29,116,965	32,688,516	26,326,485	22,676,368	(3,650,117)	-13.9%
Fire	25,639,372	30,823,543	39,409,906	35,903,389	40,963,356	5,059,967	14.1%
General Government	14,972,717	15,942,012	16,678,851	21,217,755	24,467,977	3,250,222	15.3%
Human Resources	27,425,845	28,000,468	27,945,254	32,349,993	33,784,182	1,434,189	4.4%
Info. Tech. & Telecomm.	11,430,812	15,506,239	18,741,662	15,019,557	23,838,283	8,818,726	58.7%
Metropolitan Redevelopment Agency	-	98,838	571,648	594,555	674,847	80,292	13.5%
Planning & Land Use	17,007,036	14,228,688	17,936,446	16,976,182	18,610,050	1,633,868	9.6%
Police	28,940,437	39,775,400	41,639,201	42,113,479	47,831,668	5,718,189	13.6%
Public Utilities	65,344,464	74,800,912	74,931,476	100,717,264	100,440,306	(276,958)	-0.3%
Public Works	50,087,150	66,786,259	83,582,014	71,744,063	80,542,299	8,798,236	12.3%
Regional Airport	3,123,353	6,344,339	8,074,904	5,381,897	7,739,032	2,357,135	43.8%
TOURISM Santa Fe	10,054,083	11,726,913	14,582,895	16,269,150	18,278,788	2,009,638	12.4%
*Non-Departmental**	*33,330,661*	*47,553,380*	*47,759,306*	*42,907,578*	*44,721,425*	1,813,847	4.2%
TOTAL EXPENDITURES	**347,285,844**	**425,451,958**	**482,002,854**	**480,589,392**	**521,144,821**	**40,555,429**	**8.4%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

PROPOSED FISCAL YEAR 2027 BUDGET

GENERAL FUND SUMMARY

CITY OF SANTA FE
GENERAL FUND - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

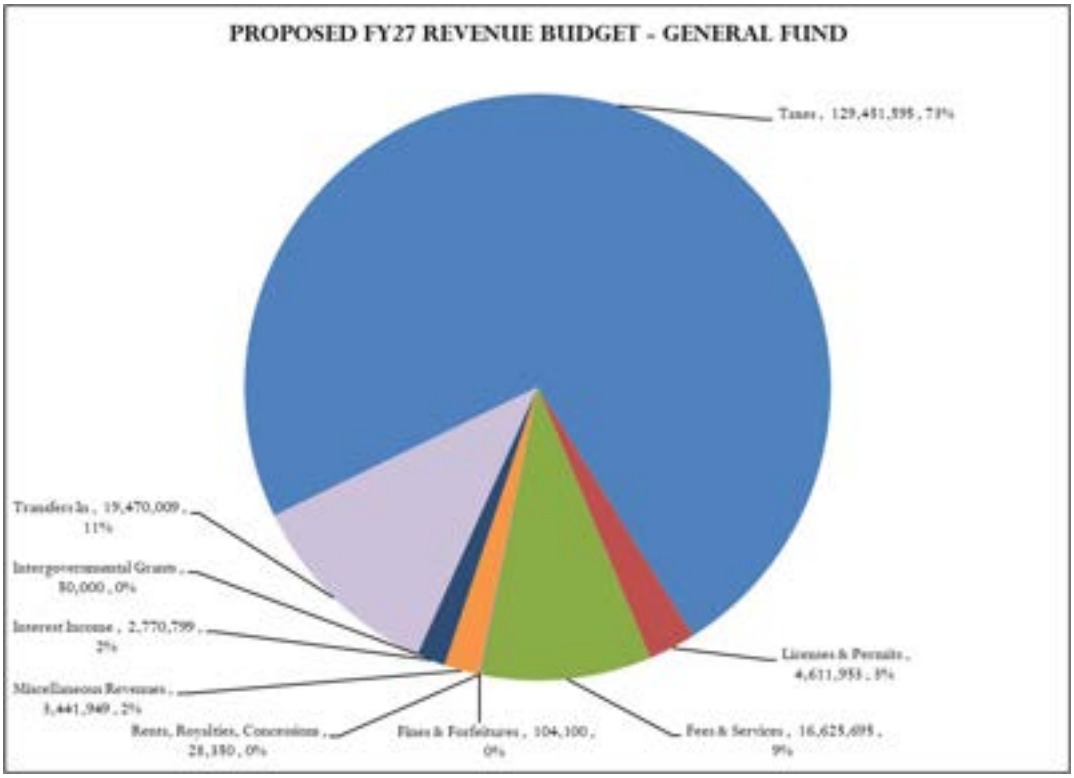
CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Local/State-Shared Taxes:							
-Gross Receipts Tax	98,962,863	106,133,722	108,907,004	104,797,172	111,103,376	6,306,204	6.0%
-Property Tax	9,516,085	10,270,979	10,811,408	11,197,436	11,499,013	301,577	2.7%
-Franchise Fees	5,607,490	5,236,545	5,366,831	5,580,741	5,586,036	5,295	0.1%
-Other Taxes	1,206,662	1,304,150	1,240,722	1,308,468	1,263,170	(45,298)	-3.5%
Subtotal - Taxes	*115,293,100*	*122,945,396*	*126,325,966*	*122,883,817*	*129,451,595*	*6,567,778*	*5.3%*
Licenses & Permits:							
-Business Licenses	912,765	758,008	751,396	816,300	691,827	(124,473)	-15.2%
-Building/Zoning Permits	3,945,937	4,790,704	4,214,670	3,155,000	3,755,000	600,000	19.0%
-Other Licenses & Permits	164,389	133,984	177,529	138,000	165,126	27,126	19.7%
Subtotal - Licenses & Permits	*5,023,090*	*5,682,696*	*5,143,595*	*4,109,300*	*4,611,953*	*502,653*	*12.2%*
Fees & Service Charges:							
-Ambulance Fees	4,649,371	3,820,330	7,362,487	5,114,308	5,887,781	773,473	15.1%
-Impact Fees	2,800	-	-	3,000	3,000	-	0.0%
-Planning/Land Use Fees	299,523	315,009	1,162,565	694,500	540,200	(154,300)	-22.2%
-Police/Court Fees	32,531	24,098	259,247	30,989	20,000	(10,989)	-35.5%
-Recreation Fees	296,206	329,153	337,588	315,350	315,350	-	0.0%
-Reimbursed Expenses	5,427,430	6,761,864	6,807,486	8,807,129	9,691,459	884,330	10.0%
-Other Fees/Services	80,058	82,722	108,105	303,500	167,905	(135,595)	-44.7%
Subtotal - Fees & Services	*10,787,919*	*11,333,176*	*16,037,479*	*15,268,776*	*16,625,695*	*1,356,919*	*8.9%*
Fines & Forfeitures:							
-Violations Fines	9,413	494	459	500	500	-	0.0%
-Other Fines & Forfeitures	137,443	98,942	73,799	103,600	103,600	-	0.0%
Subtotal - Fines & Forfeitures	*146,856*	*99,436*	*74,258*	*104,100*	*104,100*	-	*0.0%*
Rents/Royalties/Concessions:							
-Parks & Recreation - Rentals	24,263	17,310	10,292	19,750	19,750	-	0.0%
-Other Rentals	803	8,581	10,100	8,600	8,600	-	0.0%
Subtotal - Rents/Royalties	*25,066*	*25,890*	*20,392*	*28,350*	*28,350*	-	*0.0%*
Miscellaneous Revenues:							
-Sales Revenue	72,308	85,808	10,478	1,000,000	-	(1,000,000)	-100.0%
-Other Misc. Revenue	(1,821,191)	(578,593)	(3,764,505)	128,558	3,441,949	3,313,391	2577.4%
Subtotal - Miscellaneous	*(1,748,883)*	*(492,785)*	*(3,754,027)*	*1,128,558*	*3,441,949*	*2,313,391*	*205.0%*
Intergovernmental Grants:							
-State Grants	-	-	-	-	50,000	50,000	N/A
Subtotal - Intergovernmental	-	-	-	-	*50,000*	*50,000*	*N/A*
Interest on Investments	1,517,465	697,729	3,474,654	3,134,105	2,770,799	(363,306)	-11.6%
Transfers In	3,104,936	3,545,419	5,831,753	14,394,600	19,470,009	5,075,409	35.3%
TOTAL REVENUES	**134,149,549**	**143,836,957**	**153,154,069**	**161,051,606**	**176,554,450**	**15,502,844**	**9.6%**

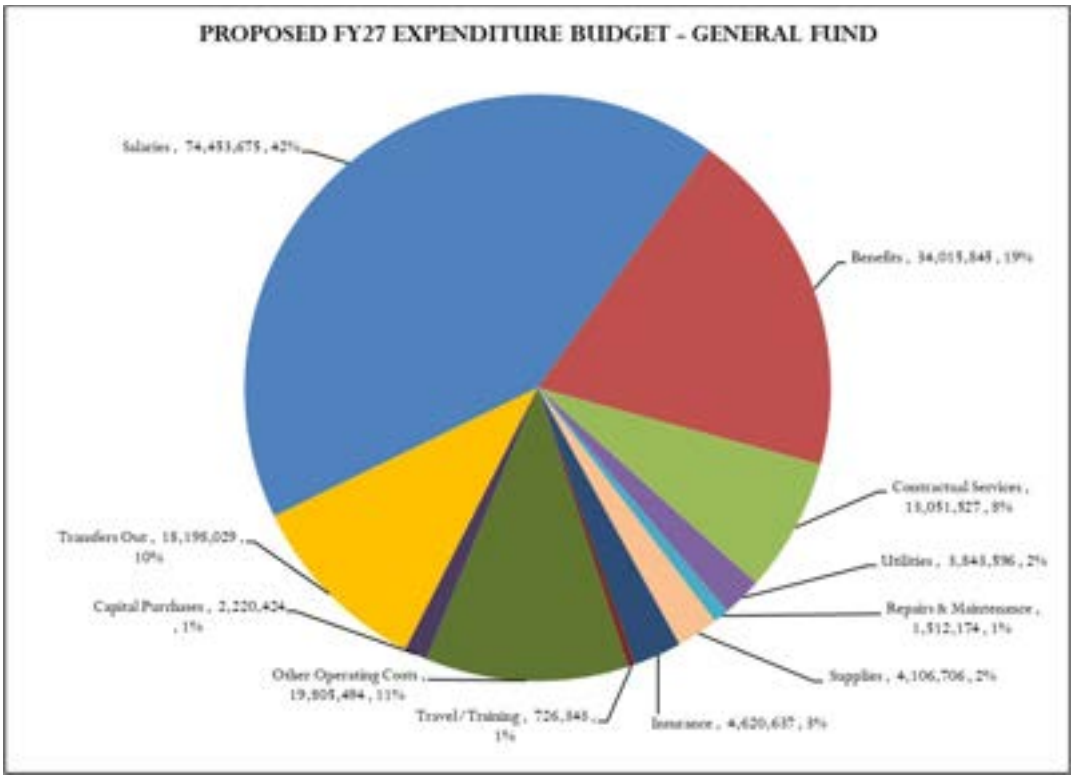
PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
GENERAL FUND - EXPENDITURES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Personnel Services:							
-Salaries	53,481,064	57,605,727	63,694,974	68,557,010	74,453,675	5,896,665	8.6%
-Benefits	25,151,714	27,733,949	30,783,006	32,351,761	34,015,845	1,664,084	5.1%
Subtotal - Personnel Services	*78,632,778*	*85,339,676*	*94,477,981*	*100,908,771*	*108,469,520*	*7,560,749*	*7.5%*
Operating Expenses:							
-Contractual Services	8,683,766	10,093,712	10,488,005	11,666,496	13,051,527	1,385,031	11.9%
-Utilities	3,878,621	4,221,509	3,648,325	4,187,596	3,843,596	(344,000)	-8.2%
-Repairs & Maintenance	1,370,827	994,212	645,664	1,186,829	1,512,174	325,345	27.4%
-Supplies	3,400,538	3,818,559	3,973,239	3,865,042	4,106,706	241,664	6.3%
-Insurance	1,780,229	4,616,911	5,015,002	5,133,798	4,620,637	(513,161)	-10.0%
-Travel/Training	357,977	422,239	544,980	618,455	726,343	107,888	17.4%
-Other Operating Costs	9,329,024	13,632,507	15,296,978	12,674,557	19,805,494	7,130,937	56.3%
Subtotal - Operating Expenses	*28,800,982*	*37,799,649*	*39,612,193*	*39,332,773*	*47,666,477*	*8,333,704*	*21.2%*
Capital Outlay:							
-Capital Purchases	17,164	4,558,722	4,181,080	1,522,201	2,000,424	478,223	31.4%
-Land & Building	228,659	129,987	435,974	220,000	220,000	-	0.0%
Subtotal - Capital Outlay	*245,823*	*4,688,709*	*4,617,054*	*1,742,201*	*2,220,424*	*478,223*	*27.4%*
Transfers Out	11,627,855	12,741,913	35,253,226	19,067,861	18,198,029	(869,832)	-4.6%
TOTAL EXPENDITURES	**119,307,438**	**140,569,947**	**173,960,454**	**161,051,606**	**176,554,450**	**15,502,844**	**9.6%**

PROPOSED FISCAL YEAR 2027 BUDGET





PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
GENERAL FUND EXPENDITURES BY DEPARTMENT
FY 2022/23 THROUGH FY 2026/27

DEPARTMENT	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Community Engagement	2,400,406	2,644,069	2,716,823	3,227,614	3,645,850	418,236	13.0%
Community Services	11,755,168	13,786,916	20,925,797	19,876,868	19,400,417	(476,451)	-2.4%
Economic Development	2,295,710	2,796,895	4,512,871	2,848,991	3,123,868	274,877	9.6%
Emergency Management	167,156	189,176	310,322	335,924	717,812	381,888	113.7%
Finance	6,959,811	8,776,466	8,695,902	8,751,208	8,825,022	73,814	0.8%
Fire	25,216,546	29,437,443	36,961,250	34,740,216	39,040,901	4,300,685	12.4%
General Government	5,557,789	6,696,573	7,273,455	8,173,823	9,640,867	1,467,044	17.9%
Human Resources	6,432,314	4,087,127	2,513,524	2,595,897	3,024,788	428,891	16.5%
Info. Tech. & Telecomm.	-	-	2,487,000	-	-	-	N/A
Planning & Land Use	9,943,714	8,366,438	12,717,660	12,105,390	13,787,841	1,682,451	13.9%
Police	26,759,108	34,491,909	36,470,397	36,813,085	40,028,902	3,215,817	8.7%
Public Works	20,562,355	28,985,909	37,040,272	30,230,696	34,019,021	3,788,325	12.5%
Non-Departmental	*1,257,362*	*311,026*	*1,335,179*	*1,351,894*	*1,299,161*	(52,733)	-3.9%
TOTAL GENERAL FUND	**119,307,438**	**140,569,947**	**173,960,454**	**161,051,606**	**176,554,450**	**15,502,844**	**9.6%**

PROPOSED FISCAL YEAR 2027 BUDGET

FY27 Proposed Budget - Position Count

Department Name	FY26 Original FTE	FY26 Current FTE	FY27 Proposed FTE	FY27 - # of Vacant Positions	Vacancy Rate Starting FY27	Notes - Changes from FY26 to FY27 (transfers, new positions, etc.)
Community Engagement	**21.0**	**21.0**	**23.0**	**3.0**	**13%**	**FY26 - 1 New FTE:** (Constituent Services) 1 Paralegal; **FY26 - 1 FTE Transferred and Reclassed:** 1 Communications Director moved from Constituent Services to General Government/City Manager; **FY27 - 2 New FTE:** (Constituent Services) 1 Translator, 1 Broadcast & Streaming Production Specialist
City Clerk	8.0	9.0	9.0	1	11%	
Constituent Services	13.0	12.0	14.0	2	14%	
Community Services	**196.5**	**202.5**	**202.5**	**33**	**16%**	**FY26 - 5 New FTE:** (Recreation) 2 Recreation Supervisors, (Youth & Family) 2 Program Managers, 1 Data Reporting & Policy Development Manager; **FY26 - 1 FTE Unfrozen:** (Recreation) 1 Recreation Supervisor, 1 Youth Program Coordinator; **FY26 - 1 FTE Frozen:** (Senior Services) 1 Transit Driver III; **FY26 - 1 FTE Transferred:** 1 Contracts Administrator moved from Library to Community Services Admin.
Community Services Admin.	6.5	7.5	7.5	2	27%	
Library	46.5	45.5	45.5	2	4%	
Recreation	82.0	86.0	86.0	22	26%	
Senior Services	53.5	52.5	52.5	5	10%	
Youth & Family	8.0	11.0	11.0	2	18%	
Economic Development	**18.0**	**21.0**	**22.0**	**5**	**23%**	**FY26 - 1 New FTE:** (Arts and Culture) 1 Administrative Manager; **FY26 - 2 New FTE:** (Economic Development) 2 term Economic Development Specialist; **FY27 - 2 New FTE:** (Economic Development) 2 term Project Manager; **FY27 - 1 FTE Frozen:** (Economic Development) 1 Community Development Director
Arts and Culture	5.0	6.0	6.0	1	17%	
Economic Development	11.0	13.0	14.0	4	29%	
Santa Fe Film	2.0	2.0	2.0	0	0%	
Emergency Management	**2.0**	**2.0**	**2.0**	**1**	**50%**	
Finance	**56.4**	**58.4**	**58.4**	**14.0**	**24%**	**FY26 - 2 New FTE:** (Budget) 1 Budget Analyst, (Finance Admin.) 1 Project Administrator
Finance Admin.	5.0	6.0	6.0	2	33%	
Accounting	18.4	18.4	18.4	6	33%	
Budget	4.0	5.0	5.0	2	40%	
Fleet Management	13.0	13.0	13.0	2	15%	
Purchasing	6.0	6.0	6.0	1	17%	
Treasurer	10.0	10.0	10.0	1	10%	
Fire	**211.0**	**210.0**	**210.0**	**16**	**8%**	**FY26 - 3 New FTE:** (Fire Admin.) 1 Project Specialist, 1 Business Operations Manager, 1 Fiscal Administrator; **FY26 - 3 FTE Unfrozen:** (Fire Admin.) 1 Administrative Assistant, (Fire Operations) 1 Forestry Tech, (Fire Support Svcs.) 1 Fire Apparatus Tech I; **FY26 - 2 FTE Transferred:** 1 Wildlife Urban Interface Specialist, 1 Fire Training Captain moved from Fire Operations to Support Svcs.
Fire Admin.	6.0	10.0	10.0	2	20%	
Fire Operations	168.0	167.0	167.0	10	6%	
Fire Support Services	37.0	33.0	33.0	4	12%	
General Government	**61.3**	**63.3**	**62.3**	**9**	**14%**	**FY26 - 4 New FTE:** (City Attorney) 1 term Paralegal Basic, 1 Legislation Coordinator, 1 Legislative Administrator, (Risk Mgmt.) 1 Risk & Safety Compliance Officer; **FY26 - 1 FTE Frozen:** (City Council) 1 Council Liaison, (Municipal Court) 1 Court Clerk; **FY27 - 1 FTE Transferred:** 1 Public Records Specialist moved from City Attorney to Police Admin.
Mayor	3.0	3.0	3.0	1	33%	
City Council	9.0	8.0	8.0	0	0%	
City Manager	5.3	5.3	5.3	1	19%	
City Attorney	20.0	23.0	22.0	6	27%	
Municipal Court	19.0	18.0	18.0	1	6%	
Risk Management & Safety	5.0	6.0	6.0	3	50%	
Human Resources	**18.0**	**17.0**	**18.0**	**2**	**11%**	**FY26 - 1 FTE Frozen:** Administrative Manager (temp); **FY27 - 1 New FTE:** 1 HR Information Systems Manager

[continued next page]

PROPOSED FISCAL YEAR 2027 BUDGET

FY27 Proposed Budget - Position Count

Department Name	FY26 Original FTE	FY26 Current FTE	FY27 Proposed FTE	FY27 - # of Vacant Positions	Vacancy Rate Starting FY27	Notes - Changes from FY26 to FY27 (transfers, new positions, etc.)
[continued from previous page]						
Info. Tech. & Telecomm.	**44.9**	**44.9**	**44.9**	**8**	**18%**	
ITT Admin.	5.0	5.0	5.0	1	20%	
ITT End User Services	9.0	9.0	9.0	1	11%	
Enterprise Application Services	7.0	7.0	7.0	4	57%	
Enterprise Resource Planning	12.9	12.9	12.9	1	8%	
Infrastructure Services	11.0	11.0	11.0	1	9%	
ITT Security & Compliance	0.0	0.0	0.0	0	0%	
Planning & Land Use	**70.0**	**71.0**	**69.0**	**14**	**178%**	**FY26 - 1 New FTE:** (Affordable Housing) 1 Project Manager; **FY26 - 3 FTE Unfrozen:** (Planning & Land Use) 1 Construction Inspector & 1 Construction Plans Examiner III unfrozen but not funded - will reflect as frozen unfunded in FY27; 1 Contracts Administrator; **FY27 - 2 New FTE:** (Affordable Housing) 2 Project Manager; **FY27 - 1 FTE Unfrozen:** (Planning & Land Use) 1 Engineer; **FY27- 2 FTE Frozen:** (Planning & Land Use) 1 Construction Inspector, 1 Construction Plans Examiner III
Land Use Admin.	8.0	7.0	7.0	1	14%	
Affordable Housing	5.0	6.0	6.0	4	67%	
Building Permit Div	11.0	11.0	10.0	4	40%	
Enforcemnt Division	0.0	8.0	8.0	0	0%	
Historic Preservation	5.0	5.0	5.0	1	20%	
Inspections Division	23.0	17.0	16.0	2	13%	
Planning Division	11.0	10.0	10.0	1	10%	
Technical Review Div	7.0	7.0	7.0	1	14%	
Metropolitan Redevelopment Agency	**2.0**	**4.0**	**3.0**	**2**	67%	**FY26 - 2 New FTE:** 1 Administrative Manager, 1 Project Manager
Police	**237.0**	**240.0**	**242.0**	**16.0**	**7%**	**FY26 - 5 New FTE:** (Police Admin.) 4 Project Specialist, 1 Police Records Supervisor; **FY26 - 2 FTE Unfrozen:** (Police Admin.) 1 Administrative Manager, 1 Public Safety Aide; **FY26 - 3 FTE Frozen:** (Police Admin.) 1 Project Admin, 1 Records Tech, 1 Admin. Manager; **FY27 - 1 FTE Transferred:** 1 Public Records Specialist moved from City Attorney to Police Admin.; **FY27 - 1 New FTE:** PIO/IPRA (position title TBD)
Police Admin.	51.0	54.0	56.0	6	11%	
Police Operations	186.0	186.0	186.0	10	5%	
Public Utilities	**261.7**	**256.7**	**259.7**	**47**	**18%**	**FY26 - 2 New FTE:** (UCS) 1 Utility Billing Division Director - retirement double fill (expires 7/1/27), (Water) 1 T&D Manager - retirement double fill (expired 10/29/25, not included in FY27); **FY26 - 1 FTE Transferred:** 1 Contracts Admin. moved from Buckman Direct Diversion to Utility Customer Service; **FY26 - 5 FTE Frozen:** (Water) unknown positions due to reclassifications and transfers between funds; **FY27 - Created New Division:** (Conservation & Sustainability) 10 total FTEs - transferred 6 FTE from Environmental Svcs., 2 FTE from Wastewater and 2 FTE from Water
Public Utilities Admin.	11.0	11.0	11.0	3	27%	
Conservation & Sustainability	0.0	0.0	10.0	4	40%	
Environmental Services	73.0	73.0	67.0	2	3%	
Utility Customer Service	29.7	31.7	31.7	6	19%	
Wastewater	68.3	66.3	64.3	20	31%	
Water	79.7	74.7	75.7	12	16%	
Public Works	**348.7**	**333.7**	**340.7**	**77**	**23%**	**FY26 - 1 FTE Unfrozen:** (Facilities) 1 Maintenance Specialist; **FY26 - 1 FTE Frozen:** (Facilities) 1 Custodian; **FY27 - 7 New FTE:** (Parks) 1 Superintendent, 1 Parks Maintenance Worker Senior, 5 Parks Maintenance Worker
Public Works Admin.	5.5	5.0	5.0	1	20%	
Facilities	56.0	55.0	55.0	8	15%	
Metropolitan Planning Organization	3.0	3.0	3.0	0	0%	
Municipal Recreation Complex	10.0	10.0	10.0	0	0%	
Parking	29.0	29.0	29.0	5	17%	
Parks Division	70.0	71.0	78.0	15	19%	
Complete Streets Division	59.7	53.7	53.7	12	22%	
Transit	115.5	107.0	107.0	36	34%	
Regional Airport	**32.0**	**37.0**	**37.0**	**7**	**19%**	**FY26 - 5 New FTE:** 3 Airport Shuttle Driver, 1 Custodian, 1 Airport Operations Officer
Tourism Santa Fe	**48.0**	**48.0**	**49.0**	**4**	**8%**	**FY26 - 1 New FTE Transferred:** 1 Parks Ranger Supervisor; moved from Visit Santa Fe to Convention Center; **FY27 - 1 New FTE:** 1 Assistant Operations Manager
Santa Fe Civic Center	23.0	24.0	24.0	1	4%	
Visitors Bureau	25.0	24.0	25.0	3	12%	
Total	**1,628.5**	**1,630.5**	**1,643.5**	**257**	**16%**	**FY26:** 29 New FTE, 10 Unfrozen FTE, 11 Frozen FTE; **FY27:** 14 New FTE, 3 Frozen FTE, 1 Unfrozen FTE

NOTE: some position counts are not whole numbers due to split-funded positions

V. DEPARTMENT EXPENDITURES

COMMUNITY ENGAGEMENT DEPARTMENT

GERALYN CARDENAS, CITY CLERK

Mission

The mission of the Community Engagement Department is to serve as the public-facing front door for city government, connecting it to constituents by providing accessible, timely information and services. The Department supports constituents by helping them access city services, resolve concerns, and connect with resources, while also delivering clear and accurate communications that keep the public informed about elections, legislation, services, and decisions. Through outreach, education, and engagement, the Community Engagement Department promotes transparency, accountability, meaningful public participation, and public awareness of city initiatives, events, and programs through official city communication channels.

The Community Engagement Department includes the City Clerk's Office, Constituent Services, Communications and Marketing, Mail and Duplications, Records and Archives and the Public Defender, which together provide access to information, public records, and essential city services.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Community Engagement Department:

- Commenced and completed the 2025 Regular Local Election (RLE);
- Finalized the records retention schedule legislation and moved it through the committee process;

- Achieved cost savings in the Department budget for in-house basic printing services totaling $384,419 for black & white copies and $102,156 for color copies, and an estimated $100,000+ savings for in-house video production;

- Successfully integrated OpenGov software into the Survey123 Customer Relationship Management (CRM) system, providing consistent updates on open work orders and a more efficient tracking system for completed work orders;

- Enhanced online outreach by the Communications and Marketing Team, achieving an 11% growth in followers and 6.8 million views on Instagram, and 4,327 Facebook followers; and

- Managed successful email communications with 468 emails sent, delivering 3.78 million messages to constituents, reaching a 99.8% delivery rate of exceptional inbox placement, a 21% open rate with 824,441 unique opens, and 3,781,313 total sends.

FY27 Budget Highlights

The Community Engagement Department's proposed FY27 budget decreased by $181,764, or 4.7%, from the original FY26 budget. The Department's proposed FY27 General Fund budget increased by $418,236, or 13%, from the original FY26 budget. The proposed FY27 budget includes $75,000 for shopping cart management and removal services; $49,500 for Spanish translation and interpretation services for public meetings and events; $20,000 for expenses related to broadcasting and streaming of Governing Body and Committee meetings; and $40,000 to address nuisance properties in the City.

The Community Engagement Department's proposed FY27 budget includes funding for 23 positions (reflecting 23 full-time equivalents or FTEs), of which 9 are budgeted in the City Clerk's Office and 14 are budgeted in the Constituent Services Division. The proposed FY27 budget for Constituent Services Division includes funding for two additional positions: a Broadcast and Streaming Production Specialist to schedule, facilitate, and produce the public-facing online components of all meetings held in the Council Chambers, including Zoom meeting creation and live streaming on the City's YouTube channel; and a Translator that was converted from a part-time to a full-time position for FY27, which will support effective written and oral communication with Spanish-speaking constituents, vendors and community members.

FY27 Goals, Objectives and Key Performance Indicators

The Community Engagement Department's goals for FY27 are as follows:

- Create City brand consistency that fosters trust in the community, and upgrade the City website for both functionality and visual appeal;

- Create a public campaign financing online portal to improve the public campaign financing process, and implement online liquor licensing and plaza vendor licensing;

- Create a community engagement plan that formalizes the City's events and enhances service delivery to the community; and

- Ensure the destruction of records that have met their retention schedule.

CITY CLERK'S OFFICE

GERALYN CARDENAS, CITY CLERK

Division Highlights and Key Services

The City Clerk's Office is dedicated to excellence and professional commitment through the provision of quality services to the Governing Body, staff, residents, and constituents. The Office strives to ensure trust and confidence in the City of Santa Fe by promoting transparency and responsiveness. The Office oversees the committee process and ensures that meeting requirements regarding agendas, packet materials, and other necessities are provided for open meetings. The Office also preserves official documents and provides a fair and ethical elections process. The City Clerk's Office also provides administrative support to the Public Defender's Office.

CONSTITUENT SERVICES

XAVIER MARTINEZ, CONSTITUENT SERVICES MANAGER

Division Highlights and Key Services

The Mission of the Constituent Services Division is to connect residents to City government and City government to the community by continuously working to make the City inclusive, transparent, accountable, and responsible to our residents. The Division's goal is to make the City of Santa Fe the most user-friendly city in the nation by collaborating with all departments, and to create and implement a one-stop shop that will enhance efficiency in the City's response to requests, issues and concerns.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
COMMUNITY ENGAGEMENT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
City Clerk	1,307,582	1,235,156	2,219,430	1,710,894	(508,536)	-22.9%
Constituent Services	1,488,487	1,481,667	1,608,184	1,934,956	326,772	20.3%
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	1,640,182	1,721,159	2,235,713	2,506,242	270,529	12.1%
Contractuals & Utilities	312,521	430,383	432,965	410,567	(22,398)	-5.2%
Repairs & Maintenance	3,813	5,520	5,000	5,000	-	0.0%
Supplies	175,563	123,787	162,296	200,975	38,679	23.8%
Insurance	66,885	75,781	71,078	71,624	546	0.8%
Other Operating Costs	424,452	295,742	920,562	451,442	(469,120)	-51.0%
Capital Purchases	110,651	64,451	-	-	-	N/A
Transfers to Other Funds	62,000	-	-	-	-	N/A
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	2,644,069	2,716,823	3,227,614	3,645,850	418,236	13.0%
Franchise Fee Fund	62,000	-	-	-	-	N/A
Public Campaign Financing	90,000	-	600,000	-	(600,000)	-100.0%
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

COMMUNITY SERVICES DEPARTMENT

SANDRA EMORY, COMMUNITY SERVICES DIRECTOR

Mission

The Community Services Department enhances the well-being of Santa Fe residents by providing inclusive programs, critical resources, and policy leadership that address the fundamental needs of individuals and families. The Department focuses on the social determinants of health—including housing; food security; healthcare access; education; childcare; employment; and transportation and social support—thereby ensuring a resilient, connected, and thriving community.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Community Services Department:

- Increased community engagement across libraries, senior centers, and recreation programs, with record-high participation in events and services;

- Secured over $1M in external funding to expand library programs, senior services, and recreational access;

- Re-launched the laptop and hotspot lending programs for the public at the City's Libraries in partnership with the Economic Development Department, and purchased new public access computers for all library branches as part of a larger project to upgrade public technology;

- Created and expanded more programs and opportunities for teens, including the addition of a Teen Hangout program at Southside Library to complement the existing one at La Farge Library; established a partnership between the Library Division and the Santa Fe Public

Schools' paid high school internship program during the summer; partnered with Santa Fe Prep for 'Boomer Tech', a program which has high school students helping seniors learn about technology; and began a tween book club for nine to twelve-year-olds;

- Increased programming, activities and support for user groups in all aspects of recreation;

- Purchased and installed several upgrades in the Recreation Division, including new pool equipment and motors to enhance water and air quality; updates to the GCCC Ice Arena heating, ventilation and air conditioning (HVAC) and dehumidification systems; renovation of the GCCC stucco; and replacement of the Ice Arena reverse osmosis water system and the water-cooling towers;

- Provided service to over 2,000 seniors in the Santa Fe area by providing 142,000 meals, 16,000 rides, and 78,595 volunteer hours via the Retired Senior Volunteers, Senior Companion and Foster Grandparent programs;

- Implemented the MySeniorCenter Program to automate check-ins, track participation in activities, and improve service delivery at the City's senior centers;

- Served 1,245 children through early childhood programs, including 44% low-income and 50% black, indigenous persons of color (BIPOC), while building a workforce pipeline of 51 apprentices enrolled in degree programs, thus strengthening long-term community capacity; and

- Sustained a 90% positive resolution rate for residents seeking food, housing, transportation, and utility assistance via the CONNECT network and its partners, while expanding the network by seven additional organizations.

FY27 Budget Highlights

The Community Services Department's proposed FY27 budget increased by $2,566,203, or 6.4%, from the original FY26 budget. The Department's proposed FY27 General Fund budget decreased by $476,451, or 2.4% from the original FY26 budget. The proposed FY27 budget includes $10 million for various contracted services, including $2.9 million for various Human Services grants to nonprofit agencies such as St. Elizabeth's Shelter, the Life Link, The Food Depot and the Solace Crisis Treatment Center; $1.5 million for youth programs including Big Brothers Big Sisters, Girls Inc., Growing Up NM, and Youth Shelters and Family Services; $1 million for eviction prevention services, $441,425 for various contracted services for the Recreation Division (including the Genoveva Chavez Community Center [GCCC]); $358,044

for various contracted services in the Library Division; and $47,000 for veteran's services including navigation services for homeless and precariously-housed veterans and scholarships for veterans and their dependents.

The proposed FY27 Community Services Department budget includes funding for 227 positions (202.5 FTE), including 8 positions (7.5 FTE) in the Community Services Administration Division, 53 positions (45.5 FTE) in the Library Division, 99 positions (86 FTE) in the Recreation Division, 56 positions (52.5 FTE) in the Senior Services Division, and 11 positions (11 FTE) in the Youth & Family Division.

FY27 Goals, Objectives and Key Performance Indicators

The Community Services Department's goals for FY27 are as follows:

- Reduce staff vacancies across all Community Services divisions to achieve a vacancy rate below 10%, prioritizing the hiring of critical positions in homelessness response, youth services, and recreation;

- Maintain safe, high-quality facilities and services;

- Improve staff training and development opportunities to ensure employees across all divisions have access to professional growth, leadership training, and skill-building programs;

- Expand Library collections, including materials in Spanish, incorporate new technology, add more internet hotspots to meet demand, and grow total circulation (print, digital and other) by 10%;

- Work with Facilities to ensure all library locations are clean, well-maintained and accessible, complete condition assessments of all libraries to address deferred maintenance issues, and include facility conditions on patron satisfaction surveys with a goal of 75% satisfaction with the condition of library branches;

- Continue to advance a comprehensive preventative maintenance schedule across all Recreation facilities, including the installation of new pumps and motors in pool areas, to enhance service quality, improve customer satisfaction and support increased revenue generation;

- Expand equitable access and inclusion in the Senior Services Division, increasing volunteer hours by 20%;

- Launch the City's second micro-community on Richards Avenue, designed to serve up to 35 families with children, incorporating a playground; dog run; garden space; onsite laundry; full hygiene facilities; secure fencing; 24/7 staffing; and integrated wraparound services; and

- Further expand the homelessness team within the Youth & Family Services Division to meet growing demand and strengthen service delivery, policy development and oversight.

LIBRARY

MARGARET NEILL, LIBRARY SERVICES DIVISION DIRECTOR

Division Highlights and Key Services

The Library Division empowers individuals and strengthens communities by providing free access to knowledge, technology, and cultural enrichment. The Division creates welcoming spaces that foster lifelong learning, literacy, and civic engagement, ensuring that all residents have the opportunity to grow, connect, and thrive.

RECREATION

TOM MILLER, RECREATION DIVISION DIRECTOR

Division Highlights and Key Services

The Recreation Division enriches the lives of Santa Fe residents by providing diverse, high-quality recreational programs, services, and facilities. The Division promotes health, wellness, and community connection through accessible and inclusive activities that support physical, mental, and social well-being for people of all ages and abilities.

SENIOR SERVICES

MANUEL SANCHEZ, SENIOR SERVICES DIVISION DIRECTOR

Division Highlights and Key Services

The Senior Services Division is committed to enhancing the lives of older adults in Santa Fe by providing essential resources, social engagement, and support services that promote independence, dignity, and well-being. The Division strives to create an age-friendly community where every senior citizen has access to the care and opportunities they deserve.

YOUTH AND FAMILY SERVICES

LIA AZUL SALAVERRY, YOUTH AND FAMILY SERVICES DIVISION DIRECTOR

Division Highlights and Key Services

The Youth and Family Services Division leads innovative efforts to address poverty, homelessness, and social inequities in Santa Fe. Through strategic partnerships, forward-thinking programs, and direct support services, the Division works to ensure that all residents—regardless of age or background—have access to the resources, stability, and opportunities they need to thrive. As a catalyst for progress in social services, Youth and Family Services advances new approaches to community well-being, thereby fostering resilience and economic mobility for those most in need.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
COMMUNITY SERVICES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Community Services Administration	1,493,950	5,425,765	1,468,544	3,185,110	1,716,566	116.9%
Library	5,588,268	6,786,644	6,361,349	6,902,735	541,386	8.5%
Recreation	12,294,268	11,222,185	13,172,769	14,810,522	1,637,753	12.4%
Senior Services	6,615,371	8,613,160	9,353,907	10,127,452	773,545	8.3%
Youth & Family	7,848,588	10,598,643	9,951,577	7,848,530	(2,103,047)	-21.1%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

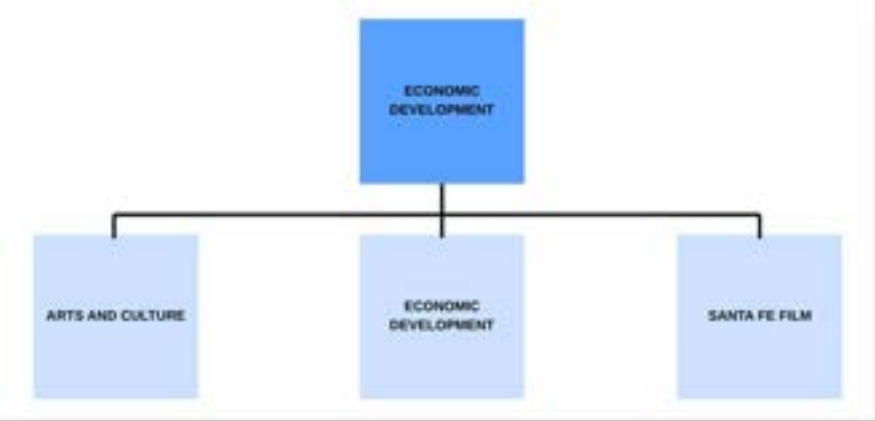
SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	12,457,056	13,674,037	16,980,050	17,900,457	920,407	5.4%
Contractuals & Utilities	8,798,076	8,384,297	7,930,929	9,982,571	2,051,642	25.9%
Repairs & Maintenance	216,476	289,029	179,932	425,700	245,768	136.6%
Supplies	2,001,022	2,132,671	1,994,650	2,066,353	71,703	3.6%
Insurance	878,434	805,411	739,169	770,656	31,487	4.3%
Other Operating Costs	2,786,308	3,811,341	2,354,510	3,654,389	1,299,879	55.2%
Capital Purchases	624,376	1,443,043	167,011	348,656	181,645	108.8%
Transfers to Other Funds	6,078,697	12,106,569	9,961,895	7,725,567	(2,236,328)	-22.4%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	13,786,916	20,925,797	19,876,868	19,400,417	(476,451)	-2.4%
Law Enforcement	58,616	91,041	316,342	678,822	362,480	114.6%
Community Development	5,915,160	5,229,866	4,092,117	5,676,631	1,584,514	38.7%
Senior Citizen Grants/Programs	4,207,798	5,091,240	5,104,743	5,361,295	256,552	5.0%
Library	1,158,908	1,488,703	1,203,977	1,272,366	68,389	5.7%
Quality of Life	54,998	128,495	163,770	163,770	-	0.0%
Recreation Programs	3,350,247	3,960,010	4,683,100	4,860,884	177,784	3.8%
Special Recreation Leagues	4,548	2,846	5,800	5,800	-	0.0%
Genoveva Chavez Community Ctr.	5,303,254	5,728,400	4,861,429	5,454,364	592,935	12.2%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

PROPOSED FISCAL YEAR 2027 BUDGET

DEPARTMENT OF ECONOMIC DEVELOPMENT & CREATIVE INDUSTRIES

JOHANNA NELSON, ACTING ECONOMIC DEVELOPMENT DIRECTOR



Mission

The mission of the Department of Economic Development & Creative Industries is to strengthen Santa Fe's economy by growing creative industries, arts and culture, creating opportunities across the community, and supporting a sustainable city. The Department integrates economic development, creative industries, Arts and Culture, and the Santa Fe Film Division to align investment, strategy, and support for Santa Fe's economy. This structure recognizes creative industries as key economic drivers and strengthens the City's ability to support business growth, industry development, and cultural vitality. The Department supports local businesses, advances creative and cultural programming, promotes placemaking, and provides resources for film and media production. Key efforts include the launch of the Creative Hub, expanded support for creative businesses and organizations, and increased coordination across divisions to improve access to resources and opportunities. By aligning these functions, the Department of Economic Development & Creative Industries is strengthening Santa Fe's economy, growing its creative industries, and building a more connected and accessible system of support.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Department of Economic Development & Creative Industries:

- Launched the Economic Development Strategic Plan, which was shaped by over 1,000 community responses, to guide long-term growth and resilience;

- Deployed over $3 million in American Rescue Plan Act (ARPA) funds to support workforce development, WiFi access, and small businesses, including the Small Business Navigator and Native Business Development Programs;

- Established a Business Retention & Expansion (BRE) framework, engaging with over 500 businesses and partnering with the Sourcelink organization for economic impact tracking;

- Launched the Go Local, Go Different initiative to integrate placemaking and business support, and formed the Small Business and Entrepreneurship Working Group under the Economic Development Advisory Committee (EDAC);

- Built a Community Investment portfolio, launching the Security Assistance for Enterprises (SAFE) project, the SPUR grant program, Regional Development Corporation (RDC) Microgrants, and the Go Local Fund, and advancing workforce development through convenings, a strategic plan, and partnerships with Santa Fe Community College;

- Activated the Community Gallery with eight exhibitions featuring over 300 artists, and dozens of public programs and events;

- Invested in arts and culture through grants to 44 nonprofit organizations, support for collaborative and public art projects, and sponsorship of more than 30 community events;

- Led Santa Fe's 200th anniversary as a UNESCO Creative City with public workshops, cultural exchange, and international artist collaboration;

- Strengthened the film sector, maintaining Santa Fe's #1 ranking by MovieMaker Magazine, expanding the film office, launching a locations directory, supporting workforce training, and breaking ground on Aspect Media Village;

- Partnered with the NYU Tisch School of the Arts, Santa Fe Community College (SFCC), and the Institute of American Indian Arts (IAIA) to deliver a three-week Indigenous Directors' workshop; and

- Co-hosted quarterly Above the Line film industry events, averaging 100 attendees.

FY27 Budget Highlights

The Department of Economic Development & Creative Industries proposed FY27 budget increased by $968,394, or 12.1%, from the original FY26 budget. The proposed FY27 budget

includes $245,000 in funding for sponsorships, $290,000 for youth programming, curatorial services, United Nations Educational, Scientific, and Cultural Organization (UNESCO) projects, public art projects, and event planning services; and $851,242 for arts- and culture-related advertising services, the majority of which is provided by Santa Fe nonprofit arts organizations. The Department's proposed FY27 budget also includes $1.2 million in contracted services, including the Small Business Navigator program, business incubation services, and ongoing Local Economic Development Act activities. The proposed FY27 budget for the Santa Fe Film Division includes $120,000 for promotional marketing services and sponsorship expenses.

In FY26, the former Arts & Culture Department and Santa Fe Film Office were reorganized as Divisions within the Department of Economic Development & Creative Industries.

The proposed FY27 budget for the Department of Economic Development & Creative Industries includes funding for 22 positions (22 FTE), including 6 positions (6 FTE) in the Arts & Culture Division, 14 positions (14 FTE) in the Economic Development Division, and 2 positions (2 FTE) in the Santa Fe Film Division. The proposed FY27 budget includes funding for two new Project Manager positions and associated equipment in the Economic Development Division, funded primarily by freezing the Community Development Director position, with the remaining $11,060 reflecting an increase to the FY27 budget.

FY27 Goals, Objectives and Key Performance Indicators

The Department of Economic Development & Creative Industries' goals for FY27 are as follows:

- Implement the Economic Development Strategic Plan, establishing clear priorities, coordinated action, and measurable outcomes to drive long-term growth and resilience;
- Expand business engagement through the BRE program, deepening relationships with 150+ businesses and strengthening data-driven decision-making;
- Increase access to capital and support services by deploying targeted grant programs and connecting businesses to funding and technical assistance;
- Improve coordination across the economic development ecosystem to strengthen communication, transparency, and access to resources;
- Address barriers to economic participation, including workforce challenges such as childcare, through alignment with partners and targeted solutions;

- Expand the City's public art portfolio through new murals, sculptures, and other enhancements, while maintaining and restoring existing works and advancing district-based projects;

- Grow Santa Fe's UNESCO Creative Cities presence through public programming, partnerships, and development of a Heritage Arts map and digital platform;

- Advance the next phase of the Greer Garson Theater redevelopment in coordination with public and private partners;

- Expand film industry engagement through a community outreach program connecting residents and businesses to opportunities;

- Develop a Film Friendly certification program to support local businesses and improve production readiness; and

- Support expansion of film infrastructure, including the SFCC backlot project, in partnership with regional stakeholders.

ARTS AND CULTURE

CHELSEY JOHNSON, ARTS AND CULTURE DIVISION DIRECTOR

Division Highlights and Key Services

The Arts and Culture Division provides leadership to support arts and cultural affairs on behalf of the City of Santa Fe. The Division creates and funds programs, cultivates connections, and recommends policies that promote and sustain the arts and the City's creative economy. The Division connects residents and visitors alike to the vibrant arts and cultures of Santa Fe, with a focus on diversity, equity, inclusion, and access.

ECONOMIC DEVELOPMENT

JOHANNA NELSON, ECONOMIC DEVELOPMENT DIVISION DIRECTOR

Division Highlights and Key Services

The mission of the Economic Development Division is to foster a thriving, diverse, and resilient economy by supporting local businesses, attracting strategic investment, and ensuring that economic opportunities benefit all residents.

PROPOSED FISCAL YEAR 2027 BUDGET

SANTA FE FILM DIVISION

JENNIFER LABAR-TAPIA, FILM OFFICE EXECUTIVE DIRECTOR/FILM COMMISSIONER

Division Highlights and Key Services

The Santa Fe Film Division was jointly established by the City and County of Santa Fe on July 1, 2016 to service, recruit and expand film and television production throughout the Santa Fe region; support and develop community businesses providing goods and services to the industry; engage in community outreach and education regarding production activity; and work with partners in the public and private sectors to expand educational and employment opportunities in the production industry for local residents.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
DEPARTMENT OF ECONOMIC DEVELOPMENT & CREATIVE INDUSTRIES - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Arts & Culture	1,575,668	2,846,099	2,117,640	2,630,720	513,080	24.2%
Economic Development	5,993,515	8,121,528	5,361,592	5,792,366	430,774	8.0%
Santa Fe Film Office	-	568,978	504,955	529,495	24,540	4.9%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	1,670,299	1,853,561	2,482,896	2,691,734	208,838	8.4%
Contractuals & Utilities	2,648,404	3,370,622	1,477,204	1,617,187	139,983	9.5%
Repairs & Maintenance	1,569	8,261	4,000	3,700	(300)	-7.5%
Supplies	54,752	100,018	98,850	148,005	49,155	49.7%
Insurance	56,239	55,893	72,688	72,861	173	0.2%
Other Operating Costs	1,210,973	1,847,702	1,840,361	2,212,815	372,454	20.2%
Capital Purchases	-	85,773	-	-	-	N/A
Debt Service	-	5,000	-	-	-	N/A
Transfers to Other Funds	1,926,948	4,209,774	2,008,188	2,206,279	198,091	9.9%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	2,796,895	4,512,871	2,848,991	3,123,868	274,877	9.6%
Economic Development	2,551,568	2,844,857	2,412,107	2,547,412	135,305	5.6%
Lodgers' Tax Fund	1,534,296	2,713,181	1,990,938	2,486,998	496,060	24.9%
Community Development	645,052	763,800	100,494	121,086	20,592	20.5%
Santa Fe Film Office	-	568,978	504,955	529,495	24,540	4.9%
Santa Fe Convention Center	41,372	132,918	126,702	143,722	17,020	13.4%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

EMERGENCY MANAGEMENT DEPARTMENT

KYLE MORGAN, EMERGENCY MANAGEMENT DIRECTOR

Mission

The Emergency Management Department builds citywide disaster readiness by leading coordinated efforts with government, private, and community partners to mitigate risks and manage crises effectively. When emergencies occur, the Department warns residents of active hazards, coordinates emergency protective measures and mass care operations, and facilitates access to mutual aid and external resources when normal systems are overwhelmed.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Emergency Management Department:

- Enhanced citywide preparedness through a comprehensive training and exercise program, engaging 100% of City departments in 14 practical, jurisdictionally-specific disaster preparedness and response activities, including two executive leadership trainings on the National Incident Management System (NIMS); a progressive three-part Emergency Operations Center (EOC) training and exercise series; an ongoing wildfire preparedness workshop series with City staff and community partners; an ongoing wildfire preparedness workshop series with City staff and community partners; a full-scale emergency response exercise at Santa Fe Regional Airport; two critical infrastructure emergency response tabletop exercises with Public Utilities; and multiple regional wildfire, public health, and critical infrastructure exercises coordinated by public and private sector partners;

- Expanded public alert and warning capabilities through the development and deployment of Ready Santa Fe, a live, map-based platform that supplements traditional text-based alerts by showing constituents where emergencies are occurring in real time, as updated by the City's own first responders;

- Managed a $3.1 million federal grant portfolio spanning 8 FEMA, US DHS, and US Department of Transportation (DOT) grants in FY26, of which $848,396 flowed directly into the Emergency Management budget, with the remaining $2.28 million supporting hazard mitigation projects for which Emergency Management holds programmatic and fiscal responsibility, while Public Works manages project development and execution; in FY26, the Department secured two new Federal grants totaling approximately $800,000 in additional preparedness and mitigation funding;

- Piloted the Resilience Initiative in collaboration with the Youth and Family Division (YFD), using Code Blue operations as an entry point to build preparedness and practice citywide

disaster response operations while supporting vulnerable residents and integrating and validating previous Emergency Operations Center trainings;

- Strengthened emergency planning by updating the City's Emergency Operations Framework, initiating Continuity of Operations and Resource Management Plans, and beginning a comprehensive revision of the City's Hazard Mitigation Plan;

- Led high-profile emergency operations, including Emergency Operations Center activations for winter weather emergencies, proposed Public Safety Power Shutoffs, and assisted with special events including the 4th of July and Zozobra;

- Expanded public preparedness by collaborating with other City departments to develop a year-round emergency preparedness public information campaign;

- Strengthened regional partnerships with Santa Fe County; Bernalillo County; the City of Albuquerque; NM Department of Homeland Security and Emergency Management; NM Energy, Minerals, and Natural Resources Department (EMNRD); the American Red Cross; the Salvation Army, the Public Service Company of New Mexico (PNM), and other regional stakeholders, through regular meetings and coordination events; and

- Enhanced wildfire early detection capabilities with the installation of a city-owned wildfire camera in the Santa Fe municipal watershed in April 2026, and coordinated with EMNRD and PNM to provide access to wildfire detection camera feeds for Emergency Management and Fire Department officials.

FY27 Budget Highlights

The Emergency Management Department’s proposed FY27 budget increased by $155,362, or 16.4%, from the original FY26 budget. The Department’s proposed FY27 General Fund budget increased by $381,888, or 113.7%, from the original FY26 budget. The proposed FY27 budget includes an additional $29,650 for training and exercise supplies and leverages $150,000 in Federal Emergency Management Agency (FEMA) grant funding and a $550,000 US Department of Homeland Security (US DHS) grant to improve emergency preparedness and response capabilities. These Federal grants are competitive by nature, meaning that the City competes with other jurisdictions for their share of this funding.

The proposed FY27 Emergency Management Department budget includes funding for 2 positions (2 FTE). The budget provides for the reclassification of the Emergency Management Coordinator position to an Assistant Director position, funded in part by a $114,856 reduction in the contractual services budget.

FY27 Goals, Objectives and Key Performance Indicators

The Emergency Management Department's goals for FY27 are as follows:

- Building and sustaining citywide readiness via a coordinated, multi-year preparedness program that builds capability across city departments, including coordination with City staff, regional partners and community stakeholders to design a training and exercise program to enhance citywide preparedness, providing a minimum of four training and exercise opportunities for City staff per year;

- Apply ongoing risk assessments to develop a jurisdiction-specific multi-year Integrated Preparedness Plan and achieve formal adoption by the City's governing body by the second quarter of FY27;

- Conduct an Emergency Management Accreditation Program (EMAP) audit and develop a multi-year strategic plan targeting accreditation by FY30;

- Strengthen emergency planning and operational continuity, maintaining current, comprehensive emergency plans that ensure the city can sustain operations and coordinate effectively during disasters, finalizing the 2026 Hazard Mitigation Plan update and the Continuity of Operations and Resource Management Plans, and integrating lessons learned and after-action findings into the citywide Emergency Operations Framework;

- Enhance public warning, information, and community resilience by expanding public access to emergency information and warning systems and building community-level resilience through coordinated outreach and programming; enhancing the Ready Santa Fe website with additional map-based features to increase public access to emergency warning, preparedness, and hazard mitigation information; coordinating seasonal public preparedness messaging through a year-round public information campaign; coordinating with YFD on the FY26 Resilience Initiative to identify opportunities to integrate community services with disaster preparedness efforts; and developing documentation and training materials for regional collaboration;

- Leverage technology to improve coordination and situational awareness by deploying platforms that enhance the City's ability to coordinate resources and manage information before, during, and after emergencies, including development of a Microsoft Teams-based Virtual Emergency Operations Center (VEOC) in FY27 to provide always-on resource coordination and information management capabilities utilizing existing City resources, and expanding the Ready Santa Fe GIS-based public information portal; and

- Ensure fiscal responsibility and grant compliance by maximizing efficient use of allocated resources and maintaining good standing with all funding agencies, ensuring timely and

accurate reporting on all active federal and state grants and maintaining 100% compliance with grant reporting requirements, and managing the Department's state and Federal grant portfolio while pursuing additional grant funding opportunities as they become available.

CITY OF SANTA FE
EMERGENCY MANAGEMENT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	229,189	293,242	273,538	323,881	50,343	18.4%
Contractuals & Utilities	98,352	7,892	243,021	16,495	(226,526)	-93.2%
Repairs & Maintenance	-	-	250	-	(250)	-100.0%
Supplies	103,340	37,425	217,351	246,601	29,250	13.5%
Insurance	7,327	8,071	6,604	9,183	2,579	39.1%
Other Operating Costs	75,253	119,907	131,176	431,142	299,966	228.7%
Capital Purchases	28,845	94,414	76,158	76,158	-	0.0%
TOTAL EMERGENCY MANAGEMENT	**542,307**	**560,952**	**948,098**	**1,103,460**	**155,362**	**16.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	189,176	310,322	335,924	717,812	381,888	113.7%
Emergency Services (grant funding)	258,037	227,958	612,174	385,648	(226,526)	-37.0%
Community Development	95,094	22,671	-	-	-	N/A
TOTAL EMERGENCY MANAGEMENT	**542,307**	**560,952**	**948,098**	**1,103,460**	**155,362**	**16.4%**

FINANCE DEPARTMENT

VACANT, FINANCE DIRECTOR

Mission

The Finance Department is committed to building the public trust through sound financial management and innovative and effective business decisions while protecting the City's assets and ensuring compliance with federal, state, and local laws and regulations. The Department is committed to providing timely, accurate, clear, and concise information to the City's leadership and departments with exemplary customer service. Finance Department employees are stewards charged with the safeguarding and oversight of the City's financial assets and resources. The Department strives to provide trust and confidence to internal and external customers, staff, and constituents.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Finance Department:

- Submitted the FY25 audit, marking the second consecutive audit filed on time with the New Mexico Office of the State Auditor;

- Completed the FY26 Annual Operating Budget on time by June 1, 2025, incorporating the implementation of phases three and four of the City-wide Compensation & Classification study that delivered pay increases to hundreds of City employees;

- Instituted updates to the City's Procurement Manual, broadening exemptions, extending the allowed term for professional service contracts, increasing small purchase thresholds, and increasing City Manager approval authority for contract amendments;

- Improved procurement and contracting processes by implementing new centralized Amazon Business account integrated with the City's Munis eProcurement system;

- Implemented the Ron Turley and Associates (RTA) Fleet Management Information System, establishing measurable baselines for preventive maintenance;

- Achieved an honorable mention in 2025 and 2026 for the Top 100 Fleets by the National Association of Fleet Administrators (NAFA);

- Successfully led and executed the fourth citywide vehicle and non-vehicle property auction, driving cross-departmental coordination and operational efficiency, and generating significant revenue that allowed for critically-needed vehicle replacements;

- Upgraded to the Munis Vendor Access system, enabling deeper security with multi-factor authentication, and implemented the Munis Capital Asset Module to modernize tracking of the City's capital assets;

- Established automated email delivery of vendor payment information to help vendors reconcile payments received against the invoice or purchase order (PO) number; and

- Processed City-wide payroll on time while issuing timely year-end W-2 forms.

FY27 Budget Highlights

The Finance Department's proposed FY27 budget decreased by $3.7 million, or 13.9%, from the original FY26 budget. The Department's proposed FY27 General Fund budget increased by $73,814, or 0.8%, from the original FY26 budget. The proposed FY27 budget includes $10 million in debt service and capital costs, including transfers to cover these costs in funds that are not fully self-supporting; $655,000 for audit and accounting support services; $165,000 for fleet management software, and $125,000 for budget management software.

The proposed FY27 Finance Department budget includes funding for 58.4 positions* (58.4 FTE), including 6 positions (6 FTE) in the Finance Administration Division; 18.4 positions* (18.4 FTE) in the Accounting Division; 5 positions (5 FTE) in the Budget Division; 13 positions (13 FTE) in the Fleet Management Division; 6 positions (6 FTE) in the Purchasing Division; and 10 positions (10 FTE) in the Treasury Division.

**The position count is not a whole number due to a split-funded position*

FY27 Goals, Objectives and Key Performance Indicators

The Finance Department's goals for FY27 are as follows:

- Complete the FY26 financial statement and compliance audit by the due date of December 15, 2026, and reduce material weakness findings identified in the audit process to zero;

- Ensure that 100% of critical financial processes are documented, approved, and consistently followed, and maintain complete and accurate financial records through timely and controlled balance sheet reconciliations, with 100% of balance sheet accounts reconciled in all funds on a quarterly basis;

- Implement new budget software (Questica) that will enable greater capabilities in the Budget Office, including better management of operating and capital budgets, improved position budgeting, and a more efficient and effective means of creating and working with budget scenarios;

- Establish a collaboration with the Public Utilities Department's Conservation and Sustainability Division to promote environmentally-friendly fleet assets and operational initiatives citywide;

- Achieve a National Association of Fleet Administrators (NAFA) Top 100 Fleets in the Americas award by the end of FY27;

- Update and modernize the City's Purchasing ordinances, Procurement Manual, and purchasing processes;

- Work with the Public Works and Public Utilities Departments, and all other Departments that manage Capital Improvement Projects (CIP), to improve management and monitoring of ongoing CIP projects;

- Optimize Treasury Division business practices to reduce the cost of City operations ;

- Implement the Bank Reconciliation Module in Tyler Munis to automate reconciliations and improve accuracy and timeliness of financial reporting, and achieve 100% migration of bank accounts into the module, thereby eliminating manual reconciliation; and

- Utilize additional functionality in the City's financial system and other subsidiary systems to support process improvements in procurement, capital assets, grants management, and treasury management.

ADMINISTRATION

VACANT, ASSISTANT FINANCE DIRECTOR

Division Highlights and Key Services

The mission of the Administration Division of the Finance Department is to provide accurate and timely support for all aspects of Finance Department operations.

The Administration Division works to ensure that Finance Department staff produce timely, accurate and relevant financial information for senior staff, the Governing Body, and the public. In line with this goal, the Finance Department will strive to prepare quarterly financial performance reports within 30 days of the end of each quarter, provide reports summarizing revenues and expenditures by department and major categories, with analysis of year-to-date performance, and present the aforementioned reports to the Finance Committee or Governing Body at the next scheduled meeting or as soon as the schedule allows.

ACCOUNTING DIVISION

MATTHEW BONIFER, CHIEF ACCOUNTING OFFICER

Division Highlights and Key Services

The mission of the Accounting Division is to provide timely, accurate, clear, and complete financial information to stakeholders, other City departments and constituents while protecting the City's assets, both real and intangible, thereby ensuring that the City maintains compliance with federal, state and local financial and fiduciary laws.

The Accounting Division endeavors to ensure the timely, accurate, and complete production of financial information in support of decision-making and compliance and strengthen internal controls by resolving audit findings, eliminating repeat issues and formalizing critical financial processes.

BUDGET DIVISION

ANDY HOPKINS, BUDGET OFFICER

Division Highlights and Key Services

The Budget Division serves the City's strategic priorities through budget development that is aligned with the Mayor and Council's priorities. The Division constantly works to provide both short- and long-term financial planning documents and information, thus enabling City-wide planning in a transparent and consistent manner.

FLEET MANAGEMENT

DAVID JARAMILLO, FLEET MANAGER

Division Highlights and Key Services

Fleet Management provides City departments with a comprehensive and extensive array of vehicle services. The Division is committed to delivering safe, efficient, and reliable fleet management services that meet the needs of City stakeholders. Through strong teamwork, disciplined execution, and a focus on continuous improvement, the Fleet Management Division ensures operational excellence, public safety, and responsible stewardship of City resources.

PURCHASING DIVISION

TRAVIS DUTTON-LEYDA, CHIEF PROCUREMENT OFFICER

Division Highlights and Key Services

The Purchasing Division provides services that add value and contribute to the City's success. The procurement team is committed to serving in accordance with best practices and cost-effective approaches in order to meet and exceed internal and external customer expectations.

TREASURY DIVISION

CLARENCE ROMERO, TREASURY OFFICER

Division Highlights and Key Services

The Treasury Division's mission is to protect and safeguard the City's fiscal assets through the collection, deposit and reconciliation of City receipts and the timely reporting of revenues.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
FINANCE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Finance Administration	1,278,975	1,312,151	1,601,441	1,893,305	291,864	18.2%
Accounting	5,383,862	3,706,177	3,097,808	2,903,443	(194,365)	-6.3%
Budget	18,200,890	23,404,980	16,387,733	12,484,831	(3,902,902)	-23.8%
Fleet Management	1,529,059	1,857,475	1,758,213	1,985,056	226,843	12.9%
Purchasing	1,639,225	963,654	1,031,152	1,203,888	172,736	16.8%
Treasury	1,084,953	1,444,078	2,450,138	2,205,845	(244,293)	-10.0%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,676,368**	**(3,650,117)**	**-13.9%**

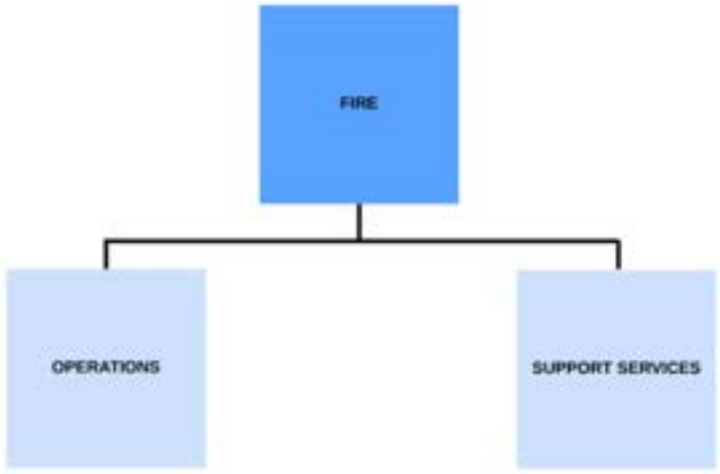
SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	4,840,314	5,962,505	6,960,781	7,009,061	48,280	0.7%
Contractuals & Utilities	4,107,679	2,109,544	2,482,700	2,015,000	(467,700)	-18.8%
Repairs & Maintenance	163,798	114,281	250,000	293,000	43,000	17.2%
Supplies	550,829	345,951	574,200	724,400	150,200	26.2%
Insurance	153,994	221,950	197,212	199,681	2,469	1.3%
Other Operating Costs	763,676	729,972	574,603	892,715	318,112	55.4%
Capital Purchases	12,292	85,914	20,000	50,000	30,000	150.0%
Transfers to Other Funds	18,524,383	23,118,399	15,266,989	11,492,511	(3,774,478)	-24.7%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,676,368**	**(3,650,117)**	**-13.9%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	8,776,466	8,695,902	8,751,208	8,825,022	73,814	0.8%
Capital Equipment Reserve	803,570	52,751	-	-	-	N/A
Lodgers' Tax Fund	93,455	137,562	352,734	177,122	(175,612)	-49.8%
Community Development	-	278	-	-	-	N/A
1/2% GRT Income Fund	17,914,415	22,244,547	15,464,330	11,689,168	(3,775,162)	-24.4%
Services to Other Depts	1,529,059	1,557,475	1,758,213	1,985,056	226,843	12.9%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,676,368**	**(3,650,117)**	**-13.9%**

PROPOSED FISCAL YEAR 2027 BUDGET

FIRE DEPARTMENT

SCOTT OUDERKIRK, INTERIM FIRE CHIEF



Mission

The mission of the Santa Fe Fire Department (SFFD) is to safeguard the Santa Fe community by professionally and efficiently preserving life and property through proactive planning, preparation, training, fire prevention, public education, and the delivery of prompt and effective emergency response, all while ensuring sustainable operational effectiveness through dedicated support services.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Fire Department:

- Achieved and maintained the highest level of community risk reduction by completing an updated city-wide Community Risk Assessment, providing fire safety education to 100% of Santa Fe elementary schools and 94% of all City schools, achieved a compliance rate of 95% for annual commercial fire inspections;

- Ensured continuous operational readiness and patient care effectiveness by maintaining a 90% availability rate for critical equipment and medical supplies, and achieved a rapid and

reliable emergency response to critical incidents, including a two-minute turnout time to structural fires;

- Cultivated an exceptional and adaptable workforce by providing 95% of staff sufficient training hours to stay current on required skills throughout the year, and successfully working toward a projected rate of 99% of staff fully trained by the end of FY26; expanding and strengthening the Department's Wellness Program to ensure that 100% of staff received annual medical and physical evaluations, and reducing lost time staff injuries by 10%, with a projected end-of-year rate of 18%;

- Developed and expanded the Department's drone program to support emergency operations and provide training and other resources to extend the program to field personnel;

- Provided over 100 wildland home assessments to help residents prepare for fire season; and

- Strengthened strategic partnerships and regional collaboration by conducting three joint operational exercises with partner agencies and keeping on track to meet the goal of four such exercises, and held interagency coordination meetings with an attendance rate of 100% of key stakeholders.

FY27 Budget Highlights

The Fire Department's proposed FY27 budget increased by $5.1 million, or 14.1%, from the original FY26 budget. The Department's proposed FY27 General Fund budget increased by $4.3 million, or 12.4%, from the original FY26 budget. The proposed FY27 budget includes $1.8 million for the City share of costs associated with the Ambulance Supplemental Payment Program (ASPP), which will lead to better City cost recovery for ambulance services. The proposed FY27 budget also includes $239,000 for replacement of one ambulance, and $400,000 for ambulance medical supplies and associated equipment to help address the rising volume of emergency response calls.

The proposed FY27 Fire Department budget provides funding for 210 positions (210 FTE), including 10 positions (10 FTE) in the Fire Administration Division, 167 positions (167 FTE) in the Fire Operations Division, and 33 positions (33 FTE) in the Support Services Division.

The proposed FY27 budget also includes funding for a collective bargaining reserve for Fire Union personnel totaling $466,866 in the Fire Department's budget, an amount equivalent to a to a 2.5% increase to salary and salary-dependent benefits for Fire Union employees.

Compensation for members of the IAFF Local 2059 will be allocated through the collective bargaining process.

FY27 Goals, Objectives and Key Performance Indicators

The Fire Department's goals for FY27 are as follows:

- Sustain financial responsibility and operational efficiency by completing a full inventory and expanding the Department's replacement schedule to include vehicles and critical EMS/Fire equipment, providing 150 quality wildland home assessments, and enhancing infrastructure with construction and facilities improvements at City Fire Stations, with the goal to spend all Legislative facilities improvements funds by the end of the fiscal year;

- Continue to cultivate an exceptional and adaptable workforce by developing a formalized quality assurance and improvement process for EMS operations that prioritizes critical medical calls, and ensure that all operational personnel remain fully trained and receive all required certifications;

- Maintain a first-rate emergency response and readiness posture by achieving a 99% level of availability for critical equipment and supplies, and sustaining rapid and reliable emergency response, including turnout times of two minutes or less, travel time within four minutes, and total response time of eight minutes or less for emergency calls;

- Optimize emergency deployment and response efficiency through strategies focused on improving response times; resource allocation; Computer-Aided Design (CAD) response layers; and vehicle deployment modeling;

- Strengthen strategic partnerships and regional collaboration by enhancing interagency collaboration and training via quarterly joint exercises and at least four joint trainings, collaborating with the Police Department to develop the tactical paramedic program and ensure that Fire staff attend related training on at least a quarterly basis, and continuing to develop the joint Police/Fire drone program by attending quarterly trainings and securing funding to further develop the program; and

- Maintain the highest level of community risk reduction and outreach by promoting fire and life safety education to 100% of Santa Fe elementary school students, achieving compliance for 95% of annual commercial fire inspections, and completing reviews of 80% of commercial building pre-plans and 100% of finished buildings.

FIRE ADMINISTRATION

SCOTT OUDERKIRK, INTERIM FIRE CHIEF

Division Highlights and Key Services

The Administration Division is the core of the Fire Department's executive leadership and administrative operations, supporting all staff members of the Department.

Services provided by the Administration Division include personnel management; accounting, budget, procurement, contracts, and financial management; data collection, management, and reporting; records management; information technology services (mobile computing, land mobile radio services, and logistics); and the management of facilities, equipment, apparatus, uniforms and personal protective gear.

FIRE OPERATIONS

SCOTT OUDERKIRK, ASSISTANT FIRE CHIEF

Division Highlights and Key Services

The mission of the Operations Division is to provide a sustainable quality of life now and in the future for the entire Santa Fe community by protecting and preventing the loss of life and property through professional and efficient planning, preparation, training, fire prevention, public education and delivery of emergency services.

SUPPORT SERVICES

MARIO RISSO, ASSISTANT FIRE CHIEF

Division Highlights and Key Services

The mission of the Support Services Division is to enhance operational effectiveness by providing efficient administrative, logistical, and personnel support. This includes strategic planning; training; fleet maintenance; EMS advancements; firefighter health & safety; fire prevention; and community outreach to ensure the highest level of service for the Santa Fe community.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
FIRE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

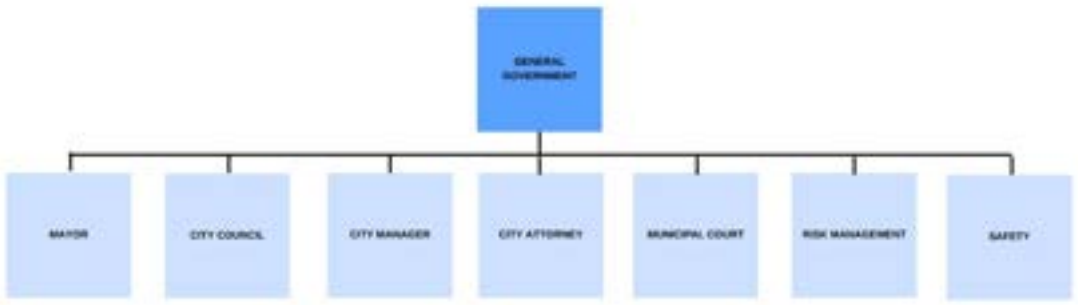
SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Fire Administration	4,003,767	5,932,596	3,483,855	6,272,055	2,788,200	80.0%
Fire Operations	20,593,763	25,840,021	25,541,866	27,060,515	1,518,649	5.9%
Support Services	6,226,012	7,637,289	6,877,668	7,630,786	753,118	11.0%
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	25,028,156	28,364,702	29,464,690	30,419,854	955,164	3.2%
Contractuals & Utilities	524,845	539,487	768,885	2,298,318	1,529,433	198.9%
Repairs & Maintenance	140,854	189,036	127,674	154,284	26,610	20.8%
Supplies	1,812,582	1,887,770	1,655,951	2,314,995	659,044	39.8%
Insurance	710,451	876,512	776,875	762,956	(13,919)	-1.8%
Other Operating Costs	1,292,611	3,360,884	2,116,782	3,912,880	1,796,098	84.9%
Capital Purchases	1,101,042	2,753,511	992,532	1,100,069	107,537	10.8%
Debt Service	89,839	214,844	-	-	-	N/A
Transfers to Other Funds	123,163	1,223,161	-	-	-	N/A
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	29,437,443	36,961,250	34,740,216	39,040,901	4,300,685	12.4%
Emergency Services	1,386,100	1,348,656	1,163,173	1,922,455	759,282	65.3%
Impact Fees Fund	-	1,100,000	-	-	-	N/A
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

GENERAL GOVERNMENT

MICHAEL GARCIA, MAYOR



Mission

General Government ensures leadership, oversight and coordination of all city operations and administration for the benefit of the broader community. The Mayor and City Manager provide support to the Governing Body in setting the overall direction for the City of Santa Fe, including the adoption of budgets, laws and resolutions.

Department Highlights and Key Services

The Mayor's Office plays a critical role in shaping a vibrant, inclusive and thriving community for the citizens of Santa Fe. As the Chief Executive Officer of the city, the Mayor is responsible for a variety of tasks, from the annual budget introduction to representing the city at public events. This multifaceted executive leadership role requires effective decision-making skills and a deep understanding of the needs and concerns of Santa Fe residents.

General Government includes various divisions and functions across several funds: the Mayor's Office, City Council, the City Manager's Office, the City Attorney's Office, the Internal Audit function, Municipal Court, and the Risk Management and Safety Division.

FY27 Budget Highlights

The proposed FY27 budget for General Government increased by $3.3 million, or 15.3%, from the original FY26 budget. The Department's proposed FY25 General Fund budget increased by $1.5 million, or 17.9%, from the original FY26 budget.

The proposed FY27 Mayor's Office budget increased by $66,626, or 10%, from the original FY26 budget. The Mayor's Office is funded entirely by the General Fund. The proposed FY27 budget includes $89,750 for various membership dues, including $37,500 for the New Mexico Municipal League (NMML), and $37,500 for participatory budgeting efforts. The proposed budget also includes funding for 3 positions (3 FTE).

The proposed FY27 City Council budget increased by $201,681, or 27%, from the original FY26 budget. Like the Mayor's Office, the City Council budget is supported entirely by the General Fund. The proposed FY27 budget includes $250,000 set aside for Council support staff; this funding was placed in the contractual services budget pending a final determination of the positions' job duties, salary levels and budgetary impact. The proposed budget also includes funding for 8 positions (8 FTE).

CITY MANAGER'S OFFICE

BRIAN MOYA, INTERIM CITY MANAGER

Department Highlights, Key Services, Recent Accomplishments

The City Manager is the chief administrative officer of the city of Santa Fe and is appointed by the Mayor and confirmed by the Governing Body. The City Manager is charged with implementing the policy decisions of the Governing Body in an effective, efficient, and equitable manner. The City Manager is also responsible for directing the City's departments and providing policy advice to the Governing Body. The majority of services, programs, initiatives and activities found in this budget fall under the purview of the City Manager. Through the Charter and the municipal code, the City Manager has authority over the City's revenues, expenditures and contracts (up to an authorized amount) and responsibility for personnel management for city employees.

The City Manager's Office works to ensure that the overall administration of the city is managed according to Federal, state and city laws and best practices.

Over the past year, the City Manager's Office:

- Supported all departments and divisions, and implemented special initiatives of the city;
- Worked with the Risk and Safety Division staff to manage claims, provide training and risk management initiatives;
- Developed the annual budget proposal in conjunction with the Budget Office staff and city leadership;

- Collaborated with City departments to develop goals, objectives and key performance indicators to provide service delivery metrics;

- Ensured implementation of Governing Body legislation and worked with the Office of Policy and Legislation to develop policy and City programs;

- Managed personnel issues, including disciplinary matters, when they arose to the City Manager's Office; and

- Met with labor unions regularly on employee and organizational matters and participated on the negotiating team for bargaining unit contracts.

FY27 Budget Highlights

The proposed FY27 budget for the City Manager's Office increased by $438,944, or 38.4%, from the original FY26 budget. The City Manager's Office is funded entirely by the General Fund. The City Manager's proposed FY25 budget includes $200,000 for various contracted services and special projects, and provides funding for 5.27 positions* (5.27 FTE).

**The position count is not a whole number due to a split-funded position*

The Internal Audit function is budgeted at $200,000 in FY27. There are no dedicated staff for this function - the Deputy City Manager and Finance Department staff collaborate with the Audit Committee to assist with audit project tracking and reporting. The City utilizes a contract with a professional auditing firm to conduct internal audits on city operations as needed. Following recommendations from the Audit Committee and the Finance Committee, the Governing Body has adopted an annual Audit Plan that identifies the areas of operations that will be reviewed. In FY27, funds are available for an audit of a utility franchisee, per municipal code requirements.

FY27 Goals, Objectives and Key Performance Indicators

The City Manager's Office goals for FY27 are as follows:

- Collaborate with the Mayor, Councilors and departmental leadership to implement adopted goals and objectives and FY27 budget priorities citywide;

- Continue efforts to improve effectiveness, efficiency and customer service of city services, including internal processes;

- Coordinate with the Audit Committee and affected departments to manage the city's internal audit function to ensure follow-through on identified process improvements;

- Facilitate success with new leadership across City departments and direct reports to ensure accountability and effective management within the recently reorganized reporting structure;

- Improve reporting on the status of city projects and the city's financial status for elected officials and the public; and

- Continue efforts to build the Risk and Safety Division's programming, ensuring safety for staff and the public.

CITY ATTORNEY'S OFFICE

MARCOS MARTINEZ, CITY ATTORNEY

Division Highlights and Key Services

The Mission of the City Attorney's Office is to advise, defend, and protect the City and enforce its laws in a timely and just manner.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the City Attorney's Office:

- Prevailed in significant litigation, including:
    - *Hill v. City of Santa Fe*, the first challenge to the City's High-End Excise Tax, in which the New Mexico Supreme Court upheld the Court of Appeals' dismissal of the case on standing, reversing the District Court;
    - *Bruce Throne v. City of Santa Fe*, effectively ending three years of litigation obstructing a 9.6-acre development for up to 28 houses with an affordable housing component;
    - *Educational Retirement Board v. City of Santa Fe*, which challenged the conditions the City imposes for obtaining water service - the City obtained a preliminary decision in its favor, in which the Court denied the Plaintiff's request for judgment;

- Addressed and improved the City's Inspection of Public Records Act (IPRA) production by responding to 10,824 IPRA requests in calendar year 2024 and 7,831 requests in calendar year 2025 – the annual reduction in requests resulted from the creation of an accident reports page that allows the public to avoid filing IPRA requests;

- Collaborated on litigation impacting important City public policy positions, including the achievement of a successful resolution to first challenge to the City's High-End Tax for Affordable Housing, and prevailing on a second challenge to the High-End Tax;

- Continued to defend the City from Federal immigration enforcement, which purports to limit Federal grant terms without congressional authority and in contradiction to the purposes of said grants; and

- Enhanced City professional development through City Attorney's Office (CAO)-led trainings, including Code of Ethics training for over 1300 employees, through 40+ live and zoom sessions; prosecutor training for Animal Control officers; Ethics Code trainings for the Governing Body; Open meetings and IPRA board trainings for the Planning Commission, Historic Districts Review Board, Metropolitan Planning Commission, and Immigration Committee; and IPRA trainings for departments, senior staff, and the Governing Body.

FY27 Budget Highlights

The proposed FY27 budget for the City Attorney's Office increased by $545,025, or 17.3%, from the original FY26 budget. The City Attorney's Office is funded entirely by the General Fund. The proposed FY27 budget includes $300,000 for various contracted legal services, and $12,500 for staff travel and training.

The proposed FY27 budget for the City Attorney's Office includes funding for 22 positions (22 FTE). For FY27, a Public Records Specialist position was transferred from the City Attorney's Office to the Police Department to assist with processing and managing police-related Inspection of Public Records Act (IPRA) requests.

FY27 Goals, Objectives and Key Performance Indicators

The City Attorney's Office goals for FY27 are as follows:

- Continue to defend the High-End Excise Tax for Affordable Housing, land use decisions and any accompanying appeals; and defend a challenge to the City's impact fees in *Las Soleras Center, LLC v. City*;

- Filed a friend of the Court brief in the New Mexico Court of Appeals in the *Sandia Pueblo v. Rio Rancho* and the *NM State Engineer* case, which, if upheld, would jeopardize water transfers to the City of Santa Fe;

- Resolve compliance actions with state and Federal agency regulations, including Airport compliance with Federal Aviation Association (FAA) and Transportation Security Administration (TSA) regulations, and wastewater discharge permit actions with the Environmental Protection Agency (EPA) and the New Mexico Environment Department (NMED);

- Support the Metropolitan Redevelopment Agency in adopting a Metropolitan Redevelopment Plan, and enter into additional disposition and development agreements and exclusive negotiation agreements with developers;

- Complete significant legislative updates, including phase two of the rewrite of the city's land use and development code; and

- Work with the Governing Body to hold more study sessions aimed at improving legislative and programmatic efficiencies throughout the City.

MUNICIPAL COURT

CHAD CHITTUM, MUNICIPAL COURT JUDGE

Division Highlights and Key Services

The mission of the Santa Fe Municipal Court is to administer justice to court participants of Santa Fe in a fair, equitable, efficient, professional and consistent manner.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Municipal Court:

- Contracted with Mesa Vista Wellness as a single source provider for the court's DWI/Drug Court program;

- Continued the Language Access Specialist incentive pay policy;

- Implemented an enhanced assessment process for offenders who are new to the criminal justice system with formalized assessment tools which examines risk, needs and resiliency and connects defendants to meaningful resources within the community, which creates accountability and promotes community safety;

- Implemented an alternative sentencing program for first-time non-DWI offenders; and

- Continued with the Outreach Court program, which allows alternative resolutions in lieu of custody, fines, and fees for precariously housed offenders, and extended program eligibility to veterans, regardless of their housing situation.

FY27 Budget Highlights

The proposed FY27 budget for the Municipal Court increased by $140,768, or 5.9%, from the original FY26 budget. The proposed FY27 budget includes $105,500 for the Municipal Court's DWI Program; $90,000 for security services; and $10,000 for Spanish language and American Sign Language (ASL) interpreters for court cases.

The proposed FY27 budget for the Municipal Court includes funding for 18 positions (18 FTE), including the Municipal Court Judge, an elected position.

FY27 Goals, Objectives and Key Performance Indicators

The Municipal Court's goals for FY27 are as follows:

- Improve courthouse security by mitigating hazards in collaboration with the Office of Emergency Management;
- Encourage professional development via training and education for court staff and the Municipal Court Judge;
- Maintain the Court's collaboration with other agencies and city partners to have warrants entered into the national database;
- Continue to review all inactive cases and take appropriate action;
- Implement the SCORE Program, which offers alternative sentencing for young adults aged between 18 and 25;
- Work with the court's case management system team to provide operational efficiency measures, including improvements in the areas of clearance rates, time to disposition, and age of active pending caseload; and
- Recertify the DWI/Drug Court Program to adhere to updated best practices.

RISK MANAGEMENT AND SAFETY

VACANT, RISK MANAGEMENT AND SAFETY DIVISION DIRECTOR

Division Highlights and Key Services

The mission of Risk Management & Safety is to assist City of Santa Fe employees in the creation of a safer work environment for all employees by working with City departments to efficiently and properly identify, manage, and mitigate hazards and finance risks; to reduce the frequency, severity and associated costs of injuries and claims; and to serve as a resource for the health, safety and well-being of City employees. Risk Management & Safety provides assessments, resources, training, and technical assistance through comprehensive workplace evaluations, high-quality training, timely customer service, and programs and resources to maintain regulatory compliance and protect the City's financial integrity. The Division provides these services with professionalism, communication, coordination and collaboration.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Risk Management and Safety Division:

- Sustained Division operations despite being short staffed, processing general liability claims for constituents and workers compensation claims for City employees;
- Presented the New Employee Safety Orientation and Defensive Driving courses on a bi-weekly basis, and offered 69 safety-related trainings to City employees; and
- Continued distribution of safety supplies and personal protective equipment (PPE) to City employees.

FY27 Budget Highlights

The proposed FY27 budget for Risk Management increased by $1.6 million, or 18%, from the original FY26 budget. The proposed budget for Safety increased by $242,969, or 5.7%, from the original FY26 budget. The proposed FY27 budget includes $9.3 million for various types of insurance claims; $3 million for workers' compensation medical/indemnity payments; and $185,500 for various contracted safety trainings for employees.

The proposed FY27 budget for Risk Management and Safety includes funding for 6 positions (6 FTE).

FY27 Goals, Objectives and Key Performance Indicators

Risk Management and Safety's goals for FY27 are as follows:

- Fill vacancies, rebuild the Safety team, and reorganize the Risk and Safety Office to better align with its responsibilities, while promoting ongoing professional development for team members;

- Assist city departments in the identification of risk, health and safety hazards and non-compliance issues, and assist in resolving those issues through education, monitoring, and problem-solving;

- Develop, implement and maintain comprehensive programs to ensure that the City remains compliant with regulations and industry standards; and

- Reduce the number of preventable accidents and injuries, and reduce both the volume and cost of preventable claims paid by the City.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
GENERAL GOVERNMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Mayor's Office	668,199	406,883	667,169	733,795	66,626	10.0%
City Council	521,385	652,878	747,867	949,548	201,681	27.0%
City Manager	701,546	916,077	1,144,336	1,583,280	438,944	38.4%
City Attorney	2,939,449	3,207,144	3,147,697	3,692,722	545,025	17.3%
Internal Audit	837	173,975	150,000	200,000	50,000	33.3%
Municipal Court	1,964,734	1,934,989	2,377,354	2,518,122	140,768	5.9%
Risk Management	7,196,538	7,395,374	8,684,414	10,248,623	1,564,209	18.0%
Safety	1,949,324	1,991,533	4,298,918	4,541,887	242,969	5.7%
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,502,506	5,644,444	6,556,468	7,207,126	650,658	9.9%
Contractuals & Utilities	1,042,516	1,186,638	1,270,827	2,235,800	964,973	75.9%
Repairs & Maintenance	4,415	12,503	6,775	7,944	1,169	17.3%
Supplies	213,169	231,612	422,928	417,422	(5,506)	-1.3%
Insurance	8,118,866	8,731,916	11,642,810	13,010,307	1,367,497	11.7%
Other Operating Costs	974,726	869,618	1,186,947	1,539,378	352,431	29.7%
Capital Purchases	23,315	-	131,000	50,000	(81,000)	-61.8%
Transfers to Other Funds	62,500	2,120	-	-	-	N/A
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	6,696,573	7,273,455	8,173,823	9,640,867	1,467,044	17.9%
Law Enforcement	99,577	18,490	60,600	36,600	(24,000)	-39.6%
Risk Management	7,784,261	7,948,567	9,514,876	11,319,574	1,804,698	19.0%
Workers' Compensation	1,361,601	1,438,340	3,468,456	3,470,936	2,480	0.1%
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

HUMAN RESOURCES DEPARTMENT

SARAH BOLLETER-GONZALES, INTERIM DIRECTOR OF HUMAN RESOURCES

Mission

The mission of the Human Resources Department is to provide human resources services that promote a work environment that fosters respect, accountability, and trust.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Human Resources Department:

- Negotiated and implemented a new contract between the City of Santa Fe and the American Federation of State, County and Municipal Employees (AFSCME), which resulted in a phased implementation of pay adjustments. In 2026, the city implemented phase two hybrid parity increases, a three percent across the board increase, and finally phase three and four of the hybrid parity increases recommended by the Classification & Compensation study. Additionally, AFSCME employees received a retention incentive of $1,000 and an increase to contractual incentive pay such as bilingual and shift differential pay;

- Worked collaboratively with city departments and divisions to fill vacant positions by hosting several rapid hiring events, which helped to reduce the citywide overall vacancy rate from 20.45% in July 2025 to 18.35% as of March 2026;

- Initiated collaborative hiring efforts with the Santa Fe Community College to provide application submittal training and scheduled targeted hiring events for newly graduated students;

- Successfully implemented a new medical, dental, vision, and life insurance contract with Blue Cross Blue Shield of New Mexico;

- Performed monthly Human Resources User Group (HUG) training for city Administrative Managers and Business Operations Managers on HR processes and the Tyler Munis Human Capital Management System software module; these encourage better cross training, understanding of city processes and effectiveness in the processing of personnel actions; and

- Supported and paid for employees to attend continuing education college-level courses and New Mexico Edge courses (training courses specific to state and local government topics hosted by New Mexico State University) for a total of 141 training sessions and 417 training hours; offered 2282 city-sponsored employee training opportunities to a total of 4,332 participants as of February 2026.

FY27 Budget Highlights

The Human Resources Department's proposed FY27 budget increased by $1.4 million, or 4.4%, from the original FY26 budget. The Department's proposed FY27 General Fund budget increased by $428,891, or 16.5%, from the original FY26 budget. The proposed FY27 budget includes $25.7 million for employee health, dental and life insurance claims and associated costs, and $197,848 for employee tuition assistance and training costs.

The proposed FY27 Human Resources Department budget includes funding for 18 positions (18 FTE). The budget also includes $162,150 for a new HR Information Systems Manager position and associated equipment to enable the City to maximize the Tyler Human Capital Management (HCM) system's capabilities, enhance efficiency and reduce the Department's reliance on outside contractors.

FY27 Goals, Objectives and Key Performance Indicators

The Human Resource Department's goals for FY27 are as follows:

- Collaborate with AFSCME to implement a mentorship program to train and share institutional knowledge;
- Implement a comprehensive city-wide training policy to ensure proper training of employees, supervisors and managers, and to track completion of required and optional training by employees;
- Continue efforts to reduce the city-wide vacancy rate to 15%;
- Finalize the ongoing internal audit of the city's recruitment process and implement recommendations as budget allows; and
- Continue efforts to update the City of Santa Fe Personnel Rules/Regulations and Policies and Administrative Employee Policies to include the solicitation of feedback from City employees.

PROPOSED FISCAL YEAR 2027 BUDGET

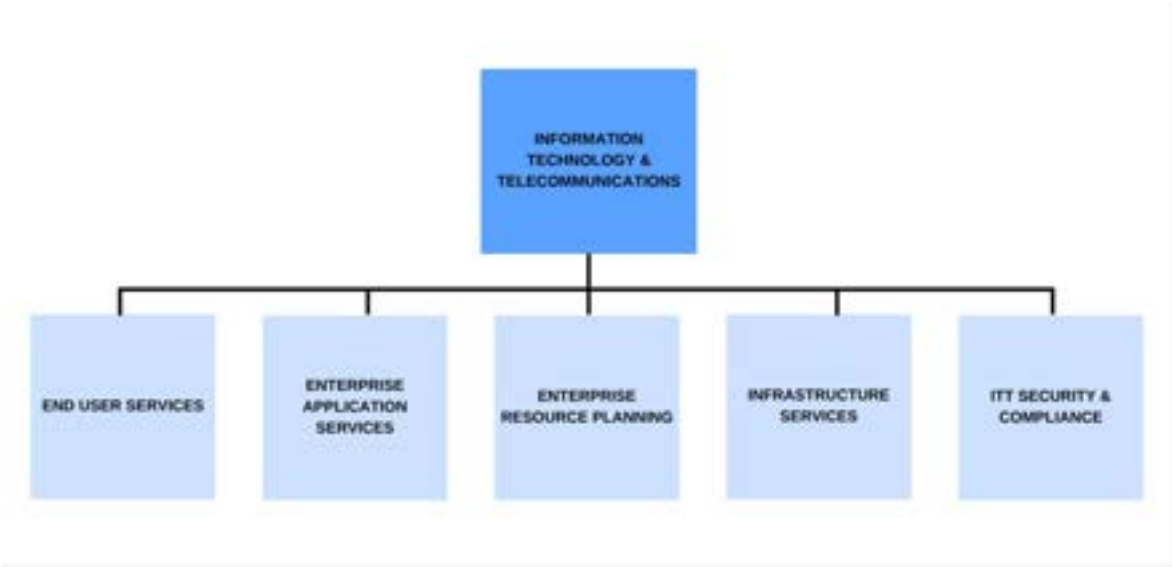
CITY OF SANTA FE
HUMAN RESOURCES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	3,505,379	2,002,176	2,042,177	2,323,886	281,709	13.8%
Contractuals & Utilities	1,369,172	1,232,782	1,442,277	1,613,541	171,264	11.9%
Repairs & Maintenance	-	67	-	-	-	N/A
Supplies	32,950	60,643	115,320	115,320	-	0.0%
Insurance	22,670,557	24,089,218	28,297,999	29,155,109	857,110	3.0%
Other Operating Costs	347,409	324,764	377,220	479,502	102,282	27.1%
Capital Purchases	-	199	-	-	-	N/A
Transfers to Other Funds	75,000	235,405	75,000	96,824	21,824	29.1%
TOTAL HUMAN RESOURCES	**28,000,468**	**27,945,254**	**32,349,993**	**33,784,182**	**1,434,189**	**4.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	4,087,127	2,513,524	2,595,897	3,024,788	428,891	16.5%
Santa Fe Health/Dental	23,834,738	25,398,056	29,678,552	30,683,850	1,005,298	3.4%
Unemployment Claims	78,602	33,673	75,544	75,544	-	0.0%
TOTAL HUMAN RESOURCES	**28,000,468**	**27,945,254**	**32,349,993**	**33,784,182**	**1,434,189**	**4.4%**

INFORMATION TECHNOLOGY AND TELECOMMUNICATIONS DEPARTMENT

ERIC CANDELARIA, INFORMATION TECHNOLOGY AND TELECOMMUNICATIONS DIRECTOR



Mission

The Information Technology and Telecommunications (ITT) Department's mission is to leverage innovative and secure technology to enhance operations, support users, and enable data-driven decision-making, thereby delivering reliable, efficient, and strategic IT services that advance organizational success. The Department strives to leverage IT to drive organizational success and operational excellence; optimize business processes through modern applications; deliver exceptional user support and secure infrastructure; align IT initiatives with strategic goals; enable informed decisions via Geographic Information Systems (GIS) and integrated communications; and maintain high-performance systems and strong data management. The ITT Department is committed to continuous improvement and innovation, the provision of reliable, secure and efficient IT services, and ongoing support of the City's operational needs.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the ITT Department:

- Implemented the new IT project intake process, which provides a standardized system for the City organization to receive, evaluate, prioritize, and approve new project requests, ensuring they align with strategic goals, fit resource availability, and have clear business cases before execution begins, thereby preventing bottlenecks and failure;

- Replaced the City of Santa Fe's outdated intranet as part of a security-driven modernization initiative, thereby addressing critical vulnerabilities, improving system reliability, and providing enhanced user access through a secure, cloud-based solution with modern design and role-based access controls;

- Modernized the IT Service Desk by developing and implementing a modern, sophisticated Information Technology Service Management (ITSM) platform, which represents a strategic investment and critical opportunity to transform the City's IT service delivery through automation, standardization, and enhanced user experience capabilities based on industry best practices;

- Implemented a secondary disaster recovery datacenter complete with daily backups of all systems to include servers and phone system circuits, for ease of restoration in the event of a disaster; and deployed a fully redundant internet infrastructure delivering doubled performance speeds by the end of the current fiscal year; and

- Updated all City devices by utilitzing the Intune system, allowing automated management of workstations and cell phones; in the future, this will also enable easier self-service options including the ability to choose from a list of optional applications to be installed on each device, and will assist in closing security gaps.

FY27 Budget Highlights

The ITT Department's proposed FY27 budget increased by $8.8 million, or 58.7%, from the original FY26 budget. The proposed FY27 budget includes $2 million for computer and network hardware purchases and replacements; $500,000 for Broadcom licensing and infrastructure support for critical infrastructure used throughout the City's technology environment, including virtualization and system management platforms that keep services running reliably; and $90,000 for network penetration testing services.

The proposed FY27 ITT budget includes funding for 44.9 positions* (44.9 FTE), comprised of 5 positions (5 FTE) in the ITT Administration Division; 9 positions (9 FTE) in the End User Services Division; 7 positions (7 FTE) in the Enterprise Application Services Division; 12.9 positions* (12.9 FTE) in the Enterprise Resource Planning Division; and 11 positions (11 FTE) in the Infrastructure Services Division.

**The position count is not a whole number due to a split-funded position*

FY27 Goals, Objectives and Key Performance Indicators

The ITT Department's goals for FY27 are as follows:

- Improve overall customer satisfaction in IT services by reducing resolution times, resolving issues at first contact whenever possible, and delivering consistently high-quality service; by tracking service-level compliance and staff performance, ITT aims to proactively reduce recurring problems and improve user experience;

- Enable digital transformation and business process improvements in order to help departments transition away from manual workflows by introducing smart, efficient digital solutions, integrating core systems and enabling self-service platforms for residents, thereby improving data flow, increasing transparency, and supporting more accessible digital services for both internal and external users; and

- Modernize and secure municipal IT infrastructure, upgrading aging technology and bolstering cybersecurity from networks to endpoints; such efforts will include replacing outdated hardware, improving patch management, expanding monitoring coverage, and accelerating the transition to cloud-ready infrastructure, with the aim to create a resilient, future-proof environment with reduced risk exposure.

ADMINISTRATIVE SUPPORT

KAYLA CONNER, ADMINISTRATIVE MANAGER

Division Highlights and Key Services

The Administrative Support Division (ASD) plays a crucial role in the IT department, providing the necessary support and management functions that allow the IT professionals to focus on technical tasks and initiatives. The Division forms the backbone that keeps the ITT Department running efficiently and effectively. ASD's mission is to execute these responsibilities with the highest level of professionalism and efficiency, thereby reinforcing the City's confidence in the ITT Department's ability to support its technological advancement.

ASD provides essential support services that ensure the smooth operation of the ITT Department. ASD provides a pivotal role in the strategic acquisition of IT resources, ensuring that the City is equipped with the necessary materials, equipment, and services to maintain its technological infrastructure. The ASD provides several key services, including resource management; budgeting and financial management for the Department; vendor management; policy development and compliance; administrative support; and human resources processes.

END USER SERVICES

MICHAEL OLGUIN, END USER SERVICES MANAGER

Division Highlights and Key Services

The End User Services Division (EUSD) is dedicated to delivering excellent IT support and services with a focus on accessibility, productivity and user satisfaction for all city staff. The EUSD is committed to ensuring that every interaction with ITT-supported services is characterized by effectiveness, efficiency, and excellence.

EUSD is committed to ensuring seamless IT experiences for the City's valued users. The Division's comprehensive suite of services encompasses the following key areas: the ITT Service Desk; computer and telecommunications support; mobile support; user guidance; telecommunications support; and hardware/software evaluation.

ENTERPRISE APPLICATION SERVICES

VACANT, ENTERPRISE APPLICATION SERVICES MANAGER

Division Highlights and Key Services

The Enterprise Application Services Division (EASD) is committed to delivering a comprehensive array of cutting-edge business and professional solutions. The Division's mission is to drive the advancement, ongoing maintenance, and robust support of enterprise-scale business applications that are tailored to meet the evolving needs of the City of Santa Fe. EASD is dedicated to fostering innovation, operational excellence, and strategic collaboration to ensure that the City's business applications deliver exceptional value and performance.

EASD offers a comprehensive suite of services designed to optimize the City's business applications. Key services include ERP program management and technical support; alignment of application requirements to business needs; systems analysis and assessment of the feasibility of proposed systems; software application management and expertise; and user education and training.

ENTERPRISE RESOURCE PLANNING

LORRAINE NOBES, ITT ENTERPRISE PROJECT MANAGER

Division Highlights and Key Services

The mission of the Enterprise Resource Planning Division, also known as the Project Management Office (PMO), is to facilitate and enhance IT-related initiatives across city departments. The Division achieves this by evaluating projects in alignment with the City's

strategies and priorities, ensuring that they adhere to standardized project delivery practices. The PMO's goal is to maximize project success, increase efficiency, and deliver impactful outcomes that support the City's overall mission.

The PMO is dedicated to elevating the efficacy of project management across the organization. Division services are meticulously designed to align with the City's strategic vision, ensuring a harmonious integration of IT initiatives. Services provided include strategic resource allocation, data transparency, risk management, project budgetary compliance, and consistent project delivery methodologies.

INFRASTRUCTURE SERVICES

LARRY WORSTELL, INFRASTRUCTURE SERVICES MANAGER

Division Highlights and Key Services

The Infrastructure Services Division (ISD) is committed to delivering exceptional technology infrastructure, network services, and solutions for the City of Santa Fe. ISD's mission includes designing, building, operating, and enhancing robust technology systems. The Division empowers staff to provide outstanding digital experiences to constituents while ensuring effective data management and security. This work contributes to the efficient functioning of the City Santa Fe's digital ecosystem.

ISD plays a pivotal role in ensuring seamless technology operations for the City of Santa Fe. The Division's comprehensive services encompass the following key areas: network infrastructure management, component support, system evaluation and implementation, and public safety radio system support.

SECURITY AND COMPLIANCE

VACANT, ITT SECURITY OFFICER

Division Highlights and Key Services

The mission of the Security and Compliance Division is to safeguard the City's information systems, data and digital services through strong security practices, proactive risk management and adherence to regulatory requirements, thus ensuring resilient operations and public trust.

The Division provides comprehensive oversight and protection for the City's technology environment. Services include cybersecurity monitoring and incident response; risk assessments; policy development and enforcement; regulatory compliance management; data protection and privacy controls; security awareness training; and continuous improvement of security practices. The Division works collaboratively across departments to reduce risk, support

secure innovation and ensure the confidentiality, integrity and availability of City systems and data.

CITY OF SANTA FE
INFORMATION TECHNOLOGY & TELECOMMUNICATIONS - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
ITT Administration	5,208,743	4,644,452	2,466,666	2,495,776	29,110	1.2%
End User Services	870,468	810,534	995,253	1,044,346	49,093	4.9%
Enterprise Application Services	2,254,979	4,904,828	2,752,479	4,961,402	2,208,923	80.3%
Enterprise Project Management	2,305,733	1,258,462	1,688,210	1,707,069	18,859	1.1%
Infrastructure Services	4,866,317	7,123,386	7,116,949	13,629,690	6,512,741	91.5%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,838,283**	**8,818,726**	**58.7%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,337,269	4,754,749	5,754,695	5,852,899	98,204	1.7%
Contractuals & Utilities	1,983,543	2,361,975	2,395,326	7,327,265	4,931,939	205.9%
Repairs & Maintenance	97,865	207,374	171,000	57,032	(113,968)	-66.6%
Supplies	1,246,244	2,312,322	1,943,221	4,379,836	2,436,615	125.4%
Insurance	97,986	199,165	154,947	156,839	1,892	1.2%
Other Operating Costs	3,061,424	5,398,800	2,744,100	4,093,982	1,349,882	49.2%
Capital Purchases	427,312	382,894	498,715	1,088,715	590,000	118.3%
Debt Service	4,596	14,970	-	-	-	N/A
Transfers to Other Funds	3,250,000	3,109,412	1,357,553	881,715	(475,838)	-35.1%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,838,283**	**8,818,726**	**58.7%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	-	2,487,000	-	-	-	N/A
1/2% GRT Income Fund	3,652,744	500,000	1,598,753	1,549,715	(49,038)	-3.1%
Services to Other Depts	11,853,495	15,754,662	13,420,804	22,288,568	8,867,764	66.1%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,838,283**	**8,818,726**	**58.7%**

METROPOLITAN REDEVELOPMENT AGENCY

CARLY VENDITTI, METROPOLITAN REDEVELOPMENT AGENCY DEPUTY DIRECTOR

Mission

The Metropolitan Redevelopment Agency (MRA) brings real estate acumen and an entrepreneurial approach to redevelopment in the City of Santa Fe. The MRA works with community and real estate experts to promote mission-driven development strategies focused on the economic, social, and environmental health of neighborhoods, districts and the people who live, work, play, and learn there.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Metropolitan Redevelopment Agency:

- Launched the direct disposition of Midtown properties and negotiated three exclusive negotiation agreements (ENAs) for parcels J-1a, J-1b, H-1a, and R-2b; these sites are designated for the Santa Fe Innovation Hub, the Blue Mesa Center for the Arts, and new townhomes;

- Finalized the Midtown Arts and Design Alliance (MADA) Ground Lease and Development Agreement (GLDA), slated for introduction in spring 2026;

- Contracted with an established real estate service company for the competitive disposition of parcels K-1b and Q-1a with a focus on affordable residential development;

- Received unanimous approval from the New Mexico Legislature for the land swap agreement with the state to acquire tracts O, A, B, D, and 3 on and adjacent to the Midtown campus, which is expected to expand opportunities for affordable housing and economic development;

- Procured a world-renowned design-build team to capitalize on the conceptual plans for the redevelopment of the Fogelson Library;

- Worked with the City's consultant on initial steps to designate the Philippe Register-designed buildings including the Fogelson Library complex, Administrative Building, and Greer Garson Theater on the National and State Historic Registers;

- Continued to steward planning initiatives including the Hopewell Mann Neighborhood Stabilization Plan (HMNSP), the Metropolitan Redevelopment Plan, the Greer Garson

Feasibility Study, and the completed Midtown Master Plan amendment, which permits film activity and residential and mixed-use development throughout the Midtown site; and

- Achieved substantial completion of the infrastructure design phase for the Midtown site, with a focus on collaboration with city staff, regional utility partners, and proposed developers.

FY27 Budget Highlights

The Metropolitan Redevelopment Agency's proposed FY27 budget increased by $80,262, or 13.5%, from the original FY26 budget. The proposed FY27 budget includes $202,218 for various contracted services, including project management and commercial property consulting services.

The proposed FY27 budget for the MRA provides funding support for 3 positions (3 FTE). The proposed FY27 budget includes funding reallocated from the frozen MRA Director position and contract reductions for two new positions (an Administrative Manager and a Project Manager) to assist with the MRA's growing responsibilities.

FY27 Goals, Objectives and Key Performance Indicators

The Metropolitan Redevelopment Agency's goals for FY27 are as follows:

- Analyze various funding avenues and phasing strategies to pay for the $77 million dollar investment prior to Tax Increment Financing district (TIF) capitalization, and work with the Purchasing Division to select a general contractor with the expertise and experience with projects at this scale via the Request for Proposals (RFP) process;

- Secure approvals and engage developers in Exclusive Negotiation Agreements (ENAs) for parcels K-1b and Q-1a and seek approval of development and disposition agreements (DDAs) for the Santa Fe Innovation Hub (parcels J-1a and J-1b) and Blue Mesa Center for the Arts (parcel H-1A);

- Continue the demolition of buildings on the Midtown campus that cannot be repurposed or that otherwise inhibit the buildout of horizontal infrastructure, prioritizing Kennedy Residence Hall, Martin Luther King Residence Hall, and Luke Science Center; and

- Develop a phased approach for the bonding, procurement and implementation of the Midtown right of way, utility, and park infrastructure upon completion of the project's design phase.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
METROPOLITAN REDEVELOPMENT AGENCY - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	95,505	280,848	304,396	404,921	100,525	33.0%
Contractuals & Utilities	-	257,769	271,326	202,218	(69,108)	-25.5%
Supplies	2,755	3,966	2,500	6,500	4,000	160.0%
Insurance	-	-	-	13,213	13,213	N/A
Other Operating Costs	578	25	16,333	47,995	31,662	193.9%
Capital Purchases	-	29,040	-	-	-	N/A
TOTAL METRO. REDEV. AGENCY	**98,838**	**571,648**	**594,555**	**674,847**	**80,292**	**13.5%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Economic Development	98,838	571,648	594,555	674,847	80,292	13.5%
TOTAL METRO. REDEV. AGENCY	**98,838**	**571,648**	**594,555**	**674,847**	**80,292**	**13.5%**

PLANNING AND LAND USE

HEATHER LAMBOY, PLANNING AND LAND USE DIRECTOR

Mission

The Planning and Land Use Department provides expert land use, planning and development guidance and regulation that supports the goals of the community. The Department achieves this by providing creative problem solving and customer service-oriented support and administration related to the City's Land Development Code, building codes and policies. Service is provided to the public with integrity and honesty, solving problems through teamwork and creativity, accepting responsibility and accountability, and promoting equity and inclusion.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Planning and Land Use Department:

- Managed and deployed housing funds to increase affordable housing supply, preserved existing homes, and expanded access to homeownership and rental assistance through strategic investments, partnerships, and support programs;
- Supported partnerships with nonprofits, developers, and public agencies to implement housing solutions that align with Santa Fe's long-term affordability goals;
- Worked to streamline development processes and support zoning changes that facilitate affordable housing construction;
- Completed Phase 1 of the Land Development Code update, which included significant instrumental changes, including affordable housing incentives and a reduction in minimum

parking standards, facilitating the adoption of Phase 1 by the Governing Body on November 19, 2025;

- Finalized and issued the General Plan Assessment Report, which is instrumental in understanding Santa Fe's existing conditions as it relates to the economy, housing, social and City services, and will provide the foundation for the policy development and implementation plan as part of Phase 2 of the project which is currently underway; solicited community engagement resulting in more than 8,000 responses from the community;

- Created and launched a Geographic Information Systems (GIS) - based digital platform known as City Smart to modernize and document Planning archives; the platform includes the residential pipeline, which provides insight into housing development and associated affordable housing starts; access to information on planning projects and other Departmental initiatives; access to information regarding cases under review, along with the associated planner's contact information, and an archive that will be added to the GIS system, enabling constituents to select a parcel and access building permit files;

- Updated the Green Building Code to include multi-family and commercial development, and ushered it through the legislative process in anticipation of a July 2026 adoption date;

- Partnered with the Finance Department to implement Neumo, a short-term rental software, which provides an easier user experience for property owners, more robust enforcement of licensing regulations, and collection and tracking of Lodger's taxes; hosted two community engagement events with over 120 participants to introduce the software; since this introduction over 850 registrations have been received and processed;

- Initiated production of the Development Manual, which is intended to provide a comprehensive guide for Planning & Land Use services, providing an opportunity to improve the efficiency of current processes; completed the stakeholder engagement phase of the project and began formulating recommendations based on feedback received in this phase;

- Continued the Department's ongoing emphasis on training and career development by supporting multiple employees in obtaining additional building code certifications and internal promotions; and

- Worked to configure and implement the OpenGov software system to support business licensing, planning, permitting, inspections, short-term rental and code enforcement functions, while analyzing and updating processes to improve efficiency.

FY27 Budget Highlights

The Planning & Land Use Department's proposed FY27 budget increased by $1.6 million, or 9.6%, from the original FY26 budget. The Department's FY26 General Fund budget increased by $1.7 million, or 13.9%, from the original FY26 budget. The proposed FY27 budget includes $4.3 million for affordable housing subsidy payments; $1.1 million for General Plan and Land Development Code updates; $260,000 for homeownership support services; $100,000 for third party plan review services; $90,000 for Technical Review support services; and $48,000 for permit and plat digitization services.

The proposed FY27 Planning & Land Use Department budget includes funding for 69 positions (69 FTE), including 10 positions (10 FTE) in the Administration Division; 6 positions (6 FTE) in the Affordable Housing Division; 10 positions (10 FTE) in the Building Permits Division; 8 positions (8 FTE) in the Enforcement Division; 5 positions (5 FTE) in the Historic Preservation Division; 16 positions (16 FTE) in the Inspections Division; 7 positions (7 FTE) in the Planning Division; and 7 positions (7 FTE) in the Technical Review Division. The proposed budget also includes funding for two new Project Manager positions and associated equipment in the Affordable Housing Division, and additional funding for a previously-frozen Engineer position, to assist with the Department's service delivery and ongoing initiatives.

FY27 Goals, Objectives and Key Performance Indicators

The Planning and Land Use Department goals for FY27 are as follows:

- Improve management and deployment of housing funds to maximize impact, increase efficiency in capital deployment, and accelerate support for affordable housing projects;

- Expand partnership and collaboration with developers, nonprofits, and public agencies to drive innovative and effective affordable housing solutions;

- Advance housing policies and zoning reforms to support the development of more affordable units and address the city's housing needs;

- Finalize the Santa Fe Forward General Plan Update, which includes an implementation plan that will carry out policy priorities and associated programs or projects;

- Initiate Phase 2 – Key Issues of the Land Development Code update and complete the adoption of the first round of code changes, including the Wildland/Urban Interface code update (in partnership with the Wildland team of the Fire Department), massage parlor regulations (in partnership with the Police Department), and the Street Design Guide (in

partnership with the Public Works Department and Metropolitan Planning Organization) by the fourth quarter of 2026;

- Expand and refine digital tools, incorporating continued development of the digital platform, ongoing scanning of paper files, and testing and completion of e-review implementation;

- Improve guidance and consistency in planning processes through the creation of a comprehensive Development Manual, including a critical look at how the Department currently operates and how processes can improve, and a Land Use Policy and Interpretation Manual to support both public users and staff;

- Streamline internal processes by conducting a review of land development workflows to identify efficiencies tied to the rollout of new guidance tools;

- Strengthen staff capacity with continued professional development and training across the Department;

- Continue the process of digitizing Planning & Land Use archives for upload to the City Smart website to enable public access to case files from previous approvals;

- Sustain community communication through the quarterly Planning & Land Use newsletter and transparent engagement on updates and projects;

- Achieve an immediate reduction of two weeks for all building permit review timelines via implementation of the e-review process, providing an avenue for better communication between the Department and the public; and

- Update the Santa Fe Acequia Study, providing more accurate mapping of acequias and laterals, illustrating both historic and active acequias, and informing site design for proposed development projects in these key cultural resource areas.

AFFORDABLE HOUSING

FAVIOLA CHAVEZ, AFFORDABLE HOUSING DIRECTOR

Department/Division Highlights and Key Services

The Affordable Housing Division works to expand and preserve housing opportunities that are accessible, sustainable, and affordable for all Santa Fe residents. The Division's mission is to support housing supply, facilitate strategic investments, and collaborate with public and private partners to ensure that individuals and families can secure stable housing that meets their needs.

In FY26 the Office of Affordable Housing was reorganized as a division of the Planning and Land Use Department.

BUILDING PERMITS

RICHARD TRUJILLO, BUILDING DIVISION MANAGER

Department/Division Highlights and Key Services

The Building Permits Division ensures code compliance for the preservation of life, safety, and the general welfare for the people of the City of Santa Fe through the provision of residential and commercial plan review and permit services. The Division is also responsible for administering the Green Building Code.

ENFORCEMENT

JASON SENA, ENFORCEMENT DIVISION MANAGER

Department/Division Highlights and Key Services

The Enforcement Division is charged with enforcing the zoning regulations of the Land Development Code and processing business licenses and short-term rentals. The Division also investigates and responds to violations of the City's environmental regulations (Chapter 10 of the Municipal Code), and regulations regarding business registrations or licenses, home occupation businesses, and short-term rentals.

HISTORIC PRESERVATION

GARY MOQUINO, PLANNER MANAGER

Department/Division Highlights and Key Services

The Historic Preservation Division administers the Historic and Archaeological Districts' overlay regulations and educates the public regarding historic preservation. In the course of administering these regulations, the Division consults with applicants, meets with interested parties, and manages the public meetings of the Historic Districts Review Board and the Archeological Review Committee.

INSPECTIONS

BOBBY PADILLA, INSPECTIONS DIVISION DIRECTOR

Department/Division Highlights and Key Services

The Inspections Division safeguards the health, safety, and welfare of the citizens of Santa Fe by inspecting structures under construction to guarantee that they are built according to established

minimum standards for structural, mechanical, plumbing, and electrical work, thus ensuring these structures are safe, sound, and sanitary. The Division is also responsible for investigating zoning and building complaints and violations, and processing short-term rental permits and associated inspections.

PLANNING

DAN ESQUIBEL, PLANNER MANAGER

Department/Division Highlights and Key Services

The Planning Division is responsible for current and future strategic planning. The Division reviews development applications for compliance with the City's Land Development Code and Planning and Land Use Department policies, while providing information, guidance, and the highest possible level of customer service to applicants, neighborhoods, the City's Land Use Boards, and the Governing Body. The Division is also responsible for developing plans and policies to guide the future development of Santa Fe in a manner that addresses the needs of the community, safeguards natural resources, and promotes equity and inclusion throughout the process.

TECHNICAL REVIEWW

DEE BEINGESSNER, DIVISION MANAGER, ENGINEER SUPERVISOR

Department/Division Highlights and Key Services

The Technical Review Division engages in technical review of, and related inspections for, development projects and building permits to ensure compliance with policies and regulations pertaining to grading and drainage; landscaping; escarpment overlay; the Americans with Disabilities Act (ADA); Gunnison’s prairie dog protection; and floodplain management. The Division administers all financial guarantees required for the development of commercial projects and subdivisions. In addition, the Division responds to citizen concerns about drainage, tree removal, and ADA compliance.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
PLANNING & LAND USE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Land Use Administration	2,367,400	3,071,174	2,795,125	3,572,244	777,119	27.8%
Affordable Housing	7,395,395	9,602,417	8,623,080	8,775,829	152,749	1.8%
Building Permit Division	761,270	748,602	918,364	969,734	51,370	5.6%
Enforcement Division	-	230,175	11,120	786,524	775,404	6973.1%
Historic Preservation	512,549	562,682	596,405	615,488	19,083	3.2%
Inspections Division	1,887,809	1,990,066	2,191,763	1,815,092	(376,671)	-17.2%
Planning Division	789,780	1,058,819	1,106,288	1,164,812	58,524	5.3%
Technical Review	514,484	672,511	734,037	910,327	176,290	24.0%
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,610,050**	**1,633,868**	**9.6%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,760,345	6,249,650	6,939,025	7,890,242	951,217	13.7%
Contractuals & Utilities	5,890,619	6,811,529	5,721,590	6,078,885	357,295	6.2%
Repairs & Maintenance	-	-	2,549	2,549	-	0.0%
Supplies	76,864	61,622	108,670	79,770	(28,900)	-26.6%
Insurance	231,348	272,503	252,181	253,848	1,667	0.7%
Other Operating Costs	852,821	706,074	717,167	1,069,756	352,589	49.2%
Capital Purchases	723,854	81,525	235,000	235,000	-	0.0%
Transfers to Other Funds	692,837	3,753,544	3,000,000	3,000,000	-	0.0%
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,610,050**	**1,633,868**	**9.6%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	8,366,438	12,717,660	12,105,390	13,787,841	1,682,451	13.9%
Impact Fees Fund	52,555	73,382	89,689	96,676	6,987	7.8%
Community Development	5,796,083	5,145,153	4,781,103	165,533	(4,615,570)	-96.5%
Affordable Housing Trust	-	-	-	4,560,000	4,560,000	N/A
Historic Preservation	13,650	-	-	-	-	N/A
Land Development	(38)	251	-	-	-	N/A
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,610,050**	**1,633,868**	**9.6%**

Affordable Housing Trust Fund

This special purpose fund is dedicated to supporting the creation and support of affordable housing in the community. Funds are derived from various sources as stipulated in the Municipal Code and the state enabling act. Each year, the City transfers $3 million from the General Fund into this fund. Additional revenues include proceeds from the sale of properties (where half goes to the Economic Development Fund and half is distributed to the Affordable Housing Trust Fund).

Estimated Beginning Fund Balance for FY27	**$5,099,609**
Annual Revenues	
General Fund Transfer	$3,000,000
High-End Excise Tax Collections *	$1,500,000
Infrastructure Loan Payments	$200,000
Payment in Lieu/Alternate Funding	$633,000
Total Resources	**$10,432,609**
Annual Expenses	
Affordable Housing Subsidies	$4,300,000
Homeownership Support Services	$260,000
Total Annual Expenses	**$4,560,000**
Projected Ending Fund Balance for FY27	**$5,872,609**

**Due to ongoing legal challenges, the City is collecting these funds and holding them unspent until further notice.*

In 2027, the City plans to fund contracts for income qualification and other services out of this fund, along with allocations through a competitive process to various agencies and developers that are creating or renovating affordable housing units in Santa Fe.

City staff are not funded out of this source and are supported by the General Fund.

The projected year end fund balance for FY27 is anticipated to be $5,872,609, including the collections for High-end Excise Tax, which are projected to increase to $1,500,000, plus a reserve of $250,000.

PROPOSED FISCAL YEAR 2027 BUDGET

POLICE DEPARTMENT

THOMAS GRUNDLER, INTERIM CHIEF OF POLICE

Mission

The mission of the Police Department is to provide City of Santa Fe residents and guests with a safe environment in which to live, work, and visit through professional service and quality policing. The Department endeavors to foster open communication, mutual respect, absolute trust, integrity, and justice within our community by working together to prevent, reduce, and combat crime and illegal activity.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Police Department:

- Launched the Axon Records system ahead of schedule; this system has shown to be much improved from the Department's previous platform, and will continue to show improvements as the Department migrates legacy data;

- Made improvements to recruitment efforts and expanded community outreach, which reduced the police officer vacancy level to 16 positions; this has allowed Detectives and Traffic Officers positions to be filled and to support Patrol Officers;

- Worked to update current policies and draft new policies, allowing the Department to begin the process of achieving accreditation with the New Mexico Municipal League;

- Fully staffed the Crime Scene Unit and endeavored to achieve staff certification, reducing the time needed for police officers to be on scene and allowing them to return to the field to handle priority calls, and thereby contributing to successful prosecutions of criminal cases;

- Conducted multiple operational plans for fugitive apprehension and proactive measures for stolen motor vehicles and shoplifting; re-established communication and networking with the New Mexico Organized Retail Crime Association (NMORCA) and executed successful operations with their teams; and worked to address cold cases;

- Planned and staffed Police coverage for 41 events, including Zozobra; Fiestas; 4th of July; the Presidential Election; the Fall Blitz and multiple driving while intoxicated (DWI) checkpoints;

- Achieved the lowest sustained vacancy rates for police officer positions in 20 years due to the diligent efforts of the Recruiting Unit, reaching a level of three Police Officer vacancies, while vacancy levels have remained below six positions since then; also, professional staff vacancies were reduced to six positions;

- Completed Pursuit Intervention Technique (PIT) training for all sworn staff, conducted by the Training Unit; this augments an array of operational techniques adopted by sworn SFPD staff, including deployment of Stop Sticks and vehicle blocking techniques, which provide officers with the tools they need to minimize the risk of dangerous offenders attempting to elude police in a vehicle; and

- Increased staffing levels in the Records Unit, adding two supervisor positions and four project specialists, to help the Department remain in compliance with strict quality control requirements for crime reporting and the discovery process for court processes.

FY27 Budget Highlights

The Police Department's proposed FY27 budget increased by $5.7 million, or 13.6%, from the original FY26 budget. The Department's proposed FY27 General Fund budget increased by $3.2 million, or 8.7%, from the original FY26 budget. The proposed FY27 budget includes $1.3 million for police vehicles (including motorcycles) and associated equipment upfit costs; $1.1 million for a contract with Santa Fe County to house jail inmates; $800,000 for the first phase of a two-year program to replace outdated radios; $750,000 for the speed and noise cameras project; and $535,000 for housing and associated costs for impounded animals at the Santa Fe Humane Society Animal Shelter.

PROPOSED FISCAL YEAR 2027 BUDGET

The proposed FY27 Police Department budget includes funding for 242 positions (242 FTE), including 56 positions (56 FTE) in the Police Administration Division and 186 positions (186 FTE) in the Operations Division. The budget also includes a collective bargaining reserve for Police Union personnel totaling $508,985, an amount equivalent to a 2.5% increase to salary and salary-dependent benefits for Police Union employees. Compensation for members of the Santa Fe Police Officer's Association will be allocated through the collective bargaining process.

The proposed FY27 budget also includes $727,531 for a new Public Information Officer and a Public Records Specialist that was transferred from the City Attorney's Office, plus associated equipment, to assist with processing and managing Inspection of Public Records Act (IPRA) requests involving the Police Department. Together, these positions would enhance the Department's ability to meet statutory deadlines, reduce backlog, and uphold the highest standards of transparency and accountability.

FY27 Goals, Objectives and Key Performance Indicators

The Police Department's goals for FY27 are as follows:

- Maintain Police response times under the national average, reducing average Priority 1 response times to less than seven minutes, reducing average Priority 2 response times to less than 10 minutes, and reducing Priority 3 response times to less than 30 minutes, by ensuring that supervisors and dispatchers are evaluating calls for service in real-time and that officers are deployed in a timely manner, evaluating sworn and non-sworn staffing resources in relation to call volume and response timeframes, and analyzing response times on a monthly basis;

- Continue the transition to the Axon Records system to improve workflow, reduce workload and improve the morale of staff with a capable and efficient records management platform;

- Explore the use of technology to assist with keeping the community safe, to include gunshot detection devices, automated traffic enforcement and use of a drone as a first responder;

- Enhance training to equip Department leaders with the skills and knowledge to conduct thorough and fair investigations, including the School of Police Staff and Command, the Federal Bureau of Investigation (FBI) National Academy, and the FBI Law Enforcement Executive Development Association (LEEDA);

- Fully staff a modern and professional police force, keeping sworn staffing vacancies under 10% by continuing to conduct proactive and consistent recruitment efforts, increasing follow-

up and contact during background process, and maintaining current staffing to focus on recruitment events and background investigations;

- Foster professional development of staff and preparation for leadership positions by tasking the Training Unit to identify and schedule department staff to attend proven leadership and skill development training, in order to ensure a succession plan for Department staff to advance in the organization;

- Maximize efficiency of field staffing resources, achieving and maintaining proactive (self-initiated) calls for service rates of 35% by continuously assessing staffing allocation in relation to high call timeframes and high-call areas, constantly evaluating appropriate team staffing in relation to shift and scheduled assignments, and monitoring support operations staffing for deployment and follow-up to "hot spot" areas;

- Maximize report writing and discovery compliance, maintaining a 100% compliance rate for discovery requests within 7 business days of the initial request by tracking all completed reports, analyzing rejection rates and identifying the stage at which rejection occurred, providing remedial training for staff receiving frequent rejections, tracking all fulfilled discovery requests, and identifying and implementing corrective action on any issues preventing discovery requests from being fulfilled within the 7 business-day timeline;

- Finalize NMML accreditation process, completing the policy review and update process, including the identification and prioritization of policies to be updated, by ensuring that at least 25% of policies are reviewed on a quarterly basis and completing all necessary quarterly policy updates within 90 days; and

- Adopt technology that helps to increase community safety and officer efficiency by identifying issues to be resolved by proposed technology upgrades, designating funding sources for the purchase and implementation of new technology, and working to develop policies related to the oversight and guidance for new technology before its implementation.

POLICE ADMINISTRATION

BEN VALDEZ, DEPUTY CHIEF OF POLICE

Division Highlights and Key Services

The Administration Division provides logistical and administrative support to the Operations Division and is responsible for the day-to-day operations of the Santa Fe Police Department.

PROPOSED FISCAL YEAR 2027 BUDGET

POLICE OPERATIONS

THOMAS GRUNDLER, DEPUTY CHIEF OF POLICE

Division Highlights and Key Services

The mission of the Operations Division is to protect lives, property, and the rights of all people to maintain order and enforce the law impartially.

CITY OF SANTA FE
POLICE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Police Administration	16,998,485	16,018,403	16,292,637	20,641,585	4,348,948	26.7%
Police Operations	22,776,915	25,620,798	25,820,842	27,190,083	1,369,241	5.3%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	25,612,137	28,966,505	29,652,902	31,900,978	2,248,076	7.6%
Contractuals & Utilities	963,171	1,352,584	1,652,589	2,341,377	688,788	41.7%
Repairs & Maintenance	136,043	185,789	199,571	211,652	12,081	6.1%
Supplies	948,770	992,809	1,048,408	1,169,339	120,931	11.5%
Insurance	1,166,076	1,528,482	1,804,304	1,871,425	67,121	3.7%
Other Operating Costs	6,220,180	5,192,392	6,232,342	8,208,202	1,975,860	31.7%
Capital Purchases	4,729,022	3,420,641	1,523,363	2,128,695	605,332	39.7%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	34,491,909	36,470,397	36,813,085	40,028,902	3,215,817	8.7%
Animal Services	64,883	1,001	4,705	5,000	295	6.3%
Law Enforcement	5,218,608	5,167,803	5,295,689	7,797,766	2,502,077	47.2%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

PUBLIC UTILITIES DEPARTMENT

JESSE ROACH, INTERIM PUBLIC UTILITIES DIRECTOR

Mission

The mission of the Public Utilities Department is to efficiently manage water, wastewater, solid waste, and customer service/billing functions, consistent with federal and state regulations and City policies. The Department provides consistent and reliable service to its customers in order to meet their needs and provide for their quality of life.

The Public Utilities Department is made up of six divisions. The Water, Wastewater, and Environmental Services Divisions (ESD) are each operated within rate-funded enterprise funds. The Utilities Administration, Conservation and Sustainability and Utility Customer Service (UCS) Divisions provide support to and are funded by the Water, Wastewater and ESD Divisions. The newly-created Conservation and Sustainability Division was established in FY26 and is focused on water conservation and reuse, environmental sustainability and the work of Keep Santa Fe Beautiful.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Public Utilities Department:

- Consolidated Utility Operator job descriptions across the Water and Wastewater Divisions and increased compensation to create intradepartmental equity and professional opportunities to attract and retain operators, leading to a significant increase in staffing levels for these Divisions;

- Reorganized the Department by pulling budget and personnel from the Water, ESD and Wastewater Divisions to establish the Conservation and Sustainability Division (CSD) as a centralized location for programs designed to shape a sustainable future for the City of Santa Fe, and remodeled the Carlos Ortega building on Agua Fria Street to house CSD;

- Completed the design phase for the ESD Administrative and Maintenance Facility;

- Added automatic gates to the Agua Fria recycling center to allow access during daylight hours, thereby significantly reducing illegal dumping at that site, and closed an unfenced and largely obscured recycling center off Airport Road that attracted large amounts of illegal dumping;

- Achieved a 20% customer participation rate for the Eye on Water app which monitors customer water use;

- Successfully completed the EPA-mandated compliance plan for Wastewater Management, improved the City's effluent water quality permit compliance level, and posted near-real-time effluent water quality data on the City's website;

- Made significant reductions to the non-personnel budget for the Wastewater Division as the City prepares for future large capital spending needs;

- Completed the $20 million Nichols Dam Outlet Conduit Rehabilitation Project;

- Secured millions of dollars in state and Federal funding to help fund capital improvement needs;

- Enhanced staffing levels and achieved an 18% department-wide vacancy rate; and

- Completed the new monitoring well at the closed Ortiz Landfill.

FY27 Budget Highlights

The Public Utilities Department's proposed FY27 budget decreased by $276,958, or 0.3%, from the original FY26 budget. The proposed FY27 budget includes $6.9 million in the Water Division for the City's share of the Buckman Direct Diversion (BDD) budget; $5.6 million for debt service payments in the Administration, Water and Wastewater Divisions; $5 million in the ESD budget for solid waste disposal fees; $3.6 million for vehicles in ESD, including three solid waste collection vehicles; $2.5 million for contracted support related to the UCS billing system

upgrade; $1.5 million in engineering services in the Water Division; and $1 million in for consulting services to assist in daily financial accounting and the year end audit.

The proposed FY27 Public Utilities Department budget includes funding for 259.7 positions* (259.7 FTE), including 11 positions (11 FTE) in the Public Utilities Administration Division; 10 positions (10 FTE) in the Conservation & Sustainability Division; 67 positions (67 FTE) in the Environmental Services Division; 31.7 positions* (31.7 FTE) in the Utility Customer Service Division; 64.3 positions (64.3 FTE) in the Wastewater Management Division; and 75.7 positions (75.7 FTE) in the Water Division.

**The position count is not a whole number due to split-funded positions*

FY27 Goals, Objectives and Key Performance Indicators

The Public Utilities Department's goals for FY27 are as follows:

- Meet all regulatory requirements for the ESD, Wastewater and Water Divisions, and completely eliminate all regulatory compliance violations;
- Upgrade the wastewater treatment plant to ensure full regulatory compliance at a minimum lifecycle cost;
- Purify wastewater into a safe drinking water resource;
- Complete the draft environmental assessment and engineering design for the San Juan-Chama Return Flow Project, with the goal to achieve project operational status by 2029;
- Begin the process of reducing solid waste flow to the Caja del Rio Landfill by creating a framework for analysis of solid waste flow to the Landfill and Buckman Road Recycling Center;
- Provide accurate and timely billing for utility services by implementing the new utility billing system by October 2026 and developing and tracking standard utility billing metrics targets;
- Implement the City's conservation and sustainability goals including transformation into a carbon neutral city by continuing to develop the new Conservation and Sustainability Division, estimating the City's current carbon footprint, and developing and tracking standard water conservation metrics; and
- Continue to enhance staffing levels and decrease the Department's vacancy rate.

CONSERVATION AND SUSTAINABILITY

CHRISTINE CHAVEZ, CONSERVATION AND SUSTAINABILITY DIVISION DIRECTOR

Division Highlights and Key Services

The Conservation and Sustainability Division (CSD) shapes and supports a sustainable future for the City of Santa Fe.

CSD is a new division within the Public Utilities Department. Programs focused on water conservation efforts, sustainability programs, and the Keep Santa Fe Beautiful function are now housed within one coordinated division. CSD works towards departmental and city-wide sustainability by focusing on conservation and compliance; community engagement and beautification; education and outreach; data and performance tracking; unified communications; and equity and inclusion.

ENVIRONMENTAL SERVICES

DEBORA TRUJILLO, ENVIRONMENTAL SERVICES DIVISION DIRECTOR

Division Highlights and Key Services

The Environmental Services Division (ESD) is committed to the protection of the City's environment and community by collecting solid waste and recyclables in a safe, efficient and responsible manner.

The ESD is the sole-source provider of municipal solid waste collection services from residential and commercial customers in the City of Santa Fe. The Division collects trash and recycling from approximately 34,000 single-family homes and about 2,500 businesses, institutions, and multi-family complexes.

UTILITY CUSTOMER SERVICE DIVISION

JOSEFA BOLDEN, UTILITY BILLING DIVISION DIRECTOR

Division Highlights and Key Services

The Mission of the Utility Customer Service Division is to provide excellent customer service for Santa Fe residents by ensuring accurate billing services and timely collection of all past due accounts. The Division provides a one-stop shop for all utility customer needs that includes water services, environmental services, and wastewater services.

The UCS Division provides prompt and courteous customer service, accurate water meter readings, timely billing for water, refuse, sewer and stormwater services, and proactive collection services for delinquent accounts.

WASTEWATER MANAGEMENT

MICHAEL DOZIER, WASTEWATER DIVISION DIRECTOR

Division Highlights and Key Services

The primary mission and objective of the Wastewater Management Division is to ensure that all sanitary sewage produced within the city's service area is collected, conveyed, and treated in compliance with local, state, and federal regulations and guidelines, and to protect the public's environment, health/safety, and welfare.

The Wastewater Management Division's services include maintenance and repair of the City's wastewater collection system, the Paseo Real Water Reclamation Facility, solids management system, and wastewater re-use facilities. The Division treats approximately five million gallons of sewage produced in the City of Santa Fe's service area in order to protect the public's environment, health, safety, and welfare. Wastewater Management also produces compost and re-use irrigation water to assist public and private industries in mitigating waste and provide a more sustainable future for the City.

WATER OPERATIONS DIVISION

JONATHAN MONTOYA, INTERIM WATER DIVISION DIRECTOR

Division Highlights and Key Services

The Water Operations Division's mission is to provide a safe, reliable, and resilient water supply to meet Santa Fe's needs.

The Water Operations Division delivers safe drinking water to customer meters from two surface water treatment plants and two well fields. The Source of Supply Section manages the Canyon Road Water Treatment Plant and the two well fields, while the BDD Section manages the BDD Water Treatment Plant, which is jointly owned with Santa Fe County. The Transmission and Distribution Section manages the distribution network to deliver water to Santa Fe homes and businesses. The Engineering Section manages capital spending to ensure that the water system is built according to Water Division standards. The Water Resources and Conservation Section works to ensure that Santa Fe will continue to have reliable and resilient water supplies for the foreseeable future.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
PUBLIC UTILITIES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Public Utilities Administration	3,439,284	2,186,009	4,093,704	3,579,549	(514,155)	-12.6%
Conservation & Sustainability	1,683,306	2,996,761	1,863,966	2,461,222	597,256	32.0%
Environmental Services	16,374,733	16,404,095	24,796,557	25,088,574	292,017	1.2%
Utility Customer Service	5,209,828	5,570,280	9,386,993	8,499,202	(887,791)	-9.5%
Wastewater Management	15,020,899	19,010,286	22,709,242	19,143,241	(3,566,001)	-15.7%
Water Operations	33,072,862	28,764,046	37,866,802	41,668,518	3,801,716	10.0%
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,440,306**	**(276,958)**	**-0.3%**

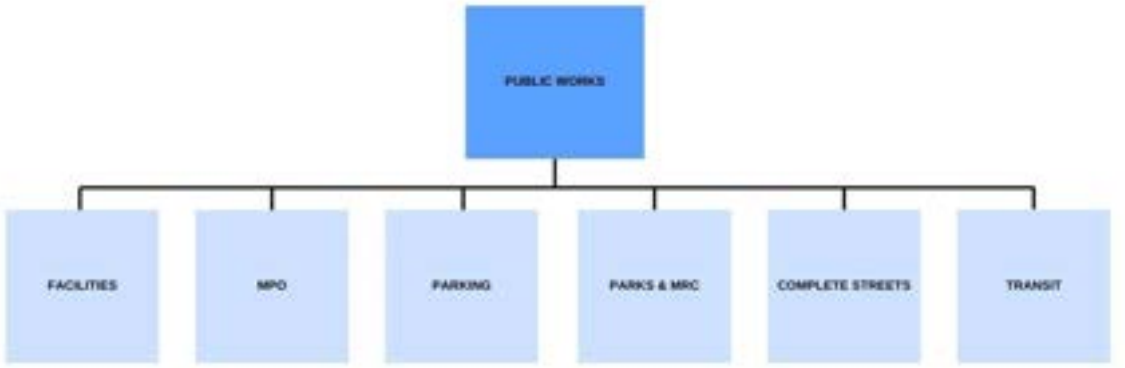
SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	18,419,827	20,857,558	25,224,532	27,312,171	2,087,639	8.3%
Contractuals & Utilities	11,803,762	14,713,448	21,043,173	23,094,615	2,051,442	9.7%
Repairs & Maintenance	3,275,335	4,440,282	5,502,600	2,751,197	(2,751,403)	-50.0%
Supplies	2,494,884	2,702,179	4,476,977	4,279,597	(197,380)	-4.4%
Insurance	1,915,740	1,321,683	1,387,124	2,110,781	723,657	52.2%
Other Operating Costs	26,688,716	19,094,961	19,075,526	18,304,237	(771,289)	-4.0%
Capital Purchases	(16,076)	1,747,318	4,996,700	4,517,500	(479,200)	-9.6%
Debt Service	2,541,386	2,533,711	5,584,253	5,584,408	155	0.0%
Transfers to Other Funds	7,677,338	7,520,336	13,426,379	12,485,800	(940,579)	-7.0%
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,440,306**	**(276,958)**	**-0.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Resource Conservation	957,664	1,028,544	1,576,663	1,051,263	(525,400)	-33.3%
Community Development	21,411	10,132	-	-	-	N/A
Waste Water Management	15,020,899	19,010,286	22,709,242	19,143,241	(3,566,001)	-15.7%
Water Management	34,734,757	31,750,675	39,730,768	41,668,518	1,937,750	4.9%
Environmental Services	16,369,733	16,404,095	24,271,157	25,088,574	817,417	3.4%
Utilities Administration	7,696,448	6,727,744	12,429,434	11,027,488	(1,401,946)	-11.3%
Conservation & Sustainability	-	-	-	2,461,222	2,461,222	N/A
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,440,306**	**(276,958)**	**-0.3%**

PROPOSED FISCAL YEAR 2027 BUDGET

PUBLIC WORKS DEPARTMENT

SAM BURNETT, INTERIM PUBLIC WORKS DEPARTMENT DIRECTOR



Mission

The Public Works Department is responsible for the planning, operation, and maintenance of the City's civic infrastructure, including streets, parks and open space, facilities, transit, parking, and stormwater systems. These services support daily community life, economic activity, public safety, and environmental stewardship.

The Public Works Department manage both capital and operational programs across multiple systems, including roadway and trail networks, public facilities, transit services, and major public assets such as the Midtown Campus and Railyard. In addition to infrastructure management, the Department plays a key role in regulatory compliance, intergovernmental coordination, and implementation of Citywide priorities.

The Public Works Department consists of the following Divisions: Facilities, Parks and Open Space, Metropolitan Planning Organization (MPO), Municipal Recreation Complex (MRC), Complete Streets and Transit.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Public Works Department:

- Delivered approximately 95 capital and facilities projects totaling $16.9 million, advancing critical upgrades across City buildings and infrastructure;

- Completed major transportation and infrastructure improvements, including roadway reconstruction, pavement rehabilitation, and targeted sidewalk repair programs to improve safety and mobility;

- Advanced traffic operations and safety enhancements, including signal upgrades, detection systems, striping, and signage improvements across the City's transportation network;

- Maintained and improved parks, open space, and recreational assets, including restoration of over 20 acres of turf, large-scale park improvements, and delivery of a 300-event season serving tens of thousands of residents and visitors;

- Achieved measurable improvements in environmental stewardship, including removal of over 20,000 pounds of waste from rivers and arroyos and implementation of stormwater and green infrastructure initiatives;

- Strengthened transit service delivery and compliance, including completion of Federal Transit Administration (FTA) review requirements and advancement of fleet replacement and infrastructure improvements;

- Advanced Midtown redevelopment efforts, including demolition, infrastructure coordination, and operational support of active facilities and major economic activity;

- Improved facility operations and asset management, including implementation of new data systems and ongoing maintenance across more than one million square feet of City facilities; and

- Enhanced parking system operations and infrastructure, including completion of the Sandoval Garage renovation and continued improvements to safety, access, and customer experience.

FY27 Budget Highlights

The Public Works Department's proposed FY27 budget increased by $8.8 million, or 12.3%, from the original FY26 budget. The Department's proposed FY27 General Fund budget increased by $3.8 million, or 12.5%, from the original FY26 budget. The proposed FY27 budget also includes $3.2 million in debt service payments for the Railyard property, Midtown Campus, and the Parking Division; $2.8 million for the professional operations contract at the MRC's Marty Sanchez Links de Santa Fe (MSL) golf course; $981,300 for contracted security services at various City facilities; and $966,849 in the Complete Streets Division for contracted traffic engineering and maintenance services.

The proposed FY27 Public Works Department budget includes funding for 341.7 positions (340.7 FTE); this includes 5 positions (5 FTE) in the Public Works Administration Division; 55

positions (55 FTE) in the Facilities Division; 3 positions (3 FTE) in the Metropolitan Planning Organization; 88 positions (88 FTE) in the Parks & Open Space Division and Municipal Recreation Complex; 29 positions (29 FTE) in the Parking Division; 53.7* positions (53.7 FTE) in the Complete Streets Division; and 108 positions (107 FTE) in the Transit Division.

**The position count is not a whole number due to split-funded positions*

The proposed FY27 budget includes $755,342 for a new Parks crew, comprising seven positions (one Parks Superintendent, two Parks Maintenance Worker Seniors, and four Parks Maintenance Workers) and associated equipment. This crew is intended to address the need for vegetation management, particularly in the City's medians, and homeless encampment cleanups. Because much of this function is currently performed by contracted labor, the cost of the crew was partially offset by a reduction of $200,000 in contractual services, which will allow the Division to transition from the current contracted service to in-house service delivery without significant disruption.

FY27 Goals, Objectives and Key Performance Indicators

For FY27, the Public Works Department will pursue the following goals:

- Focus on improving the performance and reliability of the City's infrastructure systems, strengthening operational capacity, and delivering capital investments aligned with community priorities;

- Advance a more coordinated, data-driven approach to infrastructure management while addressing system constraints related to aging assets, workforce capacity, and regulatory requirements;

- Improve the condition, performance, and long-term sustainability of the City's infrastructure systems through coordinated capital investment, proactive maintenance, and enhanced asset management practices;

- Prioritize reducing deferred maintenance across facilities and infrastructure systems, increasing the effectiveness of roadway and transportation network rehabilitation, and advancing major capital projects across parks, transit, and public facilities;

- Enhance system visibility and decision-making through expanded use of asset management tools and data systems, supporting a more strategic and transparent approach to infrastructure investment;

- Ensure that all Public Works programs, projects, and operations consistently meet regulatory, funding, and safety requirements while reducing organizational risk;

- Maintain compliance with Federal, state, and local requirements across key program areas, including transit operations, stormwater management, and capital project delivery, incorporating timely execution and reporting of grant-funded and legislatively funded projects, completion of required planning and regulatory documents, and strengthening internal coordination to address compliance gaps and audit findings;

- Continue to reinforce safety practices and documentation across all divisions;

- Strengthen workforce capacity, stability, and performance to support reliable service delivery across all Public Works functions;

- Prioritize recruitment and retention in critical operational areas, particularly in field operations and technical roles that directly impact service delivery, focusing on improving staffing levels, expanding training and professional development opportunities, and creating clearer pathways for employee advancement;

- Improve organizational alignment and communication across divisions, ensuring that staff are supported with the tools, systems, and leadership necessary to operate effectively; and

- Initiate a coordinated approach to infrastructure investment, combining capital planning, operational service delivery, and system-level performance improvements across all divisions.

FACILITIES DIVISION

TIM FARRELL, INTERIM FACILITIES DIVISION DIRECTOR

Division Highlights and Key Services

The Facilities Division provides safe, functional, and sustainable facilities that support City operations and public services. The Division is responsible for the full lifecycle management of City-owned facilities, including planning, capital investment, maintenance, and regulatory compliance, ensuring that public assets are accessible, reliable, and fiscally responsible.

The Facilities Division manages and maintains over $500 million in City-owned facilities across more than one million square feet of building space. This portfolio includes City Hall, public safety facilities, libraries, recreation centers, and major public assets such as the Midtown Campus and Railyard. The Division's core services include capital planning and management of project deliverables; preventive and corrective maintenance; facility operations and custodial services; property and asset management; and regulatory compliance and risk mitigation. For FY27, the Facilities Division will focus on transitioning from reactive maintenance to a more structured, portfolio-driven approach to capital planning and asset management.

METROPOLITAN PLANNING ORGANIZATION

ERICK AUNE, MPO OFFICER

Division Highlights and Key Services

The Santa Fe Metropolitan Planning Organization (MPO) comprises member governments including the City of Santa Fe, Santa Fe County, and Tesuque Pueblo. MPO works collaboratively with regional partners and transportation-related agencies to plan, prioritize, and advance transportation investments that improve safety, mobility, and system performance across the region. The MPO provides a forum for public engagement and intergovernmental coordination through regular meetings of the Technical Coordinating Committee and the Transportation Policy Board. The MPO is responsible for development and maintenance of the Metropolitan Transportation Plan (MTP) and the Transportation Improvement Program (TIP), which identifies federally funded and regionally significant transportation projects.

The MPO leads regional transportation planning and coordination efforts, supporting the City, County, State, and regional partners in developing and implementing transportation strategies and projects. Core functions include long-range planning, programming of federal transportation funds, data analysis, and public engagement. Key services include development and maintenance of the Metropolitan Transportation Plan (MTP); preparation and management of the Transportation Improvement Program (TIP); coordination with the City, Santa Fe County, the New Mexico Department of Transportation (NMDOT), and other regional partners; data analysis and performance monitoring to support transportation decision-making; and public engagement and stakeholder coordination on transportation initiatives. In FY26, the MPO focused on advancing long-range planning, strengthening regional coordination, and securing funding for transportation projects.

PARKS AND OPEN SPACE DIVISION

MELISSA MCDONALD, PARKS AND OPEN SPACE DIVISION DIRECTOR

Division Highlights and Key Services

The Parks and Open Space Division provides safe and inspiring parks, open spaces, and recreational experiences that enhance the quality of life in Santa Fe.

The Parks and Open Space Division manages a diverse portfolio of public assets, including 77 parks, 30 open spaces; 171 miles of trails; the historic Plaza; the 1,200-acre Municipal Recreation Complex (MRC); the Marty Sanchez Links de Santa Fe golf course; 120 miles of roadway medians; and the Santa Fe River and greenway system. The Division is also responsible for stormwater compliance under the City's National Pollutant Discharge Elimination System (NPDES) permit. In FY26, the Division focused on improving service

levels, restoring heavily used assets, advancing environmental initiatives, and supporting high-demand community programming.

PARKING

STEVE KASPAN, PARKING DIVISION DIRECTOR

Division Highlights and Key Services

The Parking Division provides safe, efficient, and accessible parking services that support mobility, economic activity, and the overall functionality of the City, while maintaining a reliable and financially sustainable parking system.

The Parking Division manages the City's parking system, including parking lots and garages, on-street parking, enforcement operations, and associated infrastructure. The Division is responsible for daily operations, revenue collection, facility maintenance, and customer service, while supporting access to commercial areas and public destinations. Core Parking Division services include parking facility operations and maintenance; enforcement of the Uniform Traffic Ordinance (UTO); parking revenue collection and financial management; administration of parking operations for City facilities; contract management; public engagement; and customer service. In FY26, the Division focused on improving facility conditions, strengthening operations, and maintaining consistent service delivery.

COMPLETE STREETS

MARCOS ESQUIBEL, INTERIM COMPLETE STREETS DIVISION DIRECTOR

Division Highlights and Key Services

The Complete Streets Division manages the City's transportation infrastructure system, including streets, sidewalks, drainage systems, and traffic operations. The Division is responsible for engineering review, construction inspection, capital project management, and day-to-day maintenance operations that support safe and efficient mobility throughout the City.

The Complete Streets Division oversees engineering plan review, construction inspection and Customer Relationship Management (CRM) response; traffic engineering and operations, including installation, repairs and maintenance of the City's signals, streetlights, and signs; maintenance of the streets, sidewalks and trails of the City, including snow removal, concrete construction, grading, sweeping, pavement maintenance, and engineering/inspection; capital projects planning and management for roadways and trails; and ADA-compliant infrastructure planning, design, and construction.

TRANSIT

GABRIELLE CHAVEZ, DIRECTOR OF ADMINISTRATION
ANDREW BACA, DIRECTOR OF OPERATIONS AND MAINTENANCE

Division Highlights and Key Services

The Transit Division's mission is to provide transit service in Santa Fe to transport area residents and visitors to their destinations, using low carbon, multi-modal transportation options. The Division manages and operates the City's public transportation system, including the Santa Fe Trails fixed-route bus system, the Santa Fe Pick-Up circulator, and the Santa Fe Ride Americans with Disabilities Act (ADA) paratransit service. These programs provide essential mobility for residents, including seniors, individuals with disabilities, commuters and visitors, while supporting equity, sustainability, and economic activity. In addition to daily transit operations, the Division provides special event services for major City events and maintains compliance with federal and state transportation regulations. In FY26, the Division focused on improving system reliability, advancing capital investments, strengthening compliance, and addressing workforce and fleet challenges.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
PUBLIC WORKS DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Public Works Administration	1,200,030	1,145,485	1,425,488	1,927,735	502,247	35.2%
Facilities Maintenance	12,260,213	20,222,466	15,254,797	19,187,457	3,932,660	25.8%
Metropolitan Planning Organization	434,664	654,398	550,173	555,716	5,543	1.0%
Municipal Recreation Complex	5,051,856	3,723,000	7,843,879	8,391,096	547,217	7.0%
Parking Division	5,541,877	5,594,102	5,996,713	6,363,772	367,059	6.1%
Parks Division	13,918,361	21,194,725	16,247,453	17,846,418	1,598,965	9.8%
Complete Streets Division	18,806,207	19,205,380	11,896,032	12,055,919	159,887	1.3%
Transit	9,573,051	11,842,458	12,529,528	14,214,186	1,684,658	13.4%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,542,299**	**8,798,236**	**12.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	21,808,242	25,366,671	27,510,356	31,698,795	4,188,439	15.2%
Contractuals & Utilities	12,433,174	12,206,210	16,264,303	15,853,300	(411,003)	-2.5%
Repairs & Maintenance	2,581,244	2,043,705	3,480,555	3,894,447	413,892	11.9%
Supplies	2,227,847	2,111,226	2,346,667	2,342,596	(4,071)	-0.2%
Insurance	2,315,341	2,022,576	2,166,614	2,025,985	(140,629)	-6.5%
Other Operating Costs	9,130,701	9,620,708	5,629,004	7,279,571	1,650,567	29.3%
Capital Purchases	5,096,536	6,714,553	4,136,032	4,826,640	690,608	16.7%
Debt Service	1,162,381	1,229,231	4,479,000	3,200,447	(1,278,553)	-28.5%
Transfers to Other Funds	10,030,792	22,267,134	5,731,532	9,420,518	3,688,986	64.4%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,542,299**	**8,798,236**	**12.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	28,985,909	37,040,272	30,230,696	34,019,021	3,788,325	12.5%
Resource Conservation	168,117	181,508	185,517	-	(185,517)	-100.0%
City Drainage Fund	1,089,736	2,244,125	3,316,540	3,591,329	274,789	8.3%
Impact Fees Fund	2,106,152	1,938,504	-	-	-	N/A
Transportation Grants	501,535	727,456	679,552	1,125,307	445,755	65.6%
Community Development	1,117,260	226,407	-	-	-	N/A
Plaza Use Fund	43,914	126,352	35,500	35,500	-	0.0%
Public Facilities Fund	145,696	-	-	-	-	N/A
Quality of Life	95,696	283,425	251,650	252,650	1,000	0.4%
Streets & Roadways	2,730,650	2,373,138	1,762,470	1,843,090	80,620	4.6%
1/2% GRT Income Fund	4,798,712	11,469,661	4,403,702	7,194,207	2,790,505	63.4%
Railyard Properties	1,397,210	1,201,157	2,787,346	1,993,833	(793,513)	-28.5%
Midtown Campus	4,784,087	4,683,508	4,773,939	5,262,197	488,258	10.2%
Municipal Recreation Complex	3,773,528	3,723,000	4,920,289	5,216,798	296,509	6.0%
Parking	5,541,877	5,594,102	5,996,713	6,363,772	367,059	6.1%
Transit Bus System	9,506,181	11,769,399	12,400,149	13,644,595	1,244,446	10.0%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,542,299**	**8,798,236**	**12.3%**

PROPOSED FISCAL YEAR 2027 BUDGET

REGIONAL AIRPORT DEPARTMENT

JIMMY GUNN, INTERIM AIRPORT DIRECTOR

Mission

The Santa Fe Regional Airport is dedicated to connecting people and communities while honoring the unique cultural heritage and natural beauty of Northern New Mexico. The Airport provides safe, efficient, and sustainable travel options that enhance the visitor experience and support local businesses. The Airport's commitment to environmental responsibility creates a welcoming gateway for residents and visitors alike.

The Regional Airport Department operates and maintains the Airport, which includes managing leases; building and infrastructure maintenance; collaborating with airlines and Fixed Base Operators (FBOs) to ensure high-quality services to the community; compliance with Federal Aviation Administration (FAA) and Transportation Security Administration (TSA) regulations; and pursuing and managing grant funding to support the Airport's operations and capital improvements.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Airport Department:

- Added a retail gift shop at the Santa Fe Airport, generating revenue and enhancing the passenger experience at the airport;
- Submitted and received approval for a Passenger Facility Charge (PFC) application to the FAA, which will generate more revenue for the airport's capital outlay projects; and
- Completed improvements to the Airport's paid parking facilities and collections systems, which will increase estimated revenue from parking operations by a projected $1.2 million in FY27.

FY27 Budget Highlights

The Regional Airport Department's proposed FY27 budget increased by $2.4 million, or 43.8%, from the original FY26 budget. The budget includes $415,000 for Airport Terminal maintenance and repairs; $400,000 for baggage handling improvements; $370,000 for replacement of a forklift and dump truck; and $89,200 for airport software systems including maintenance management software, operations tracking systems, parking lot management software, and audit-related software.

The proposed FY27 Regional Airport Department budget includes funding for 37 positions (37 FTE). For FY27, an Airport Shuttle Driver position was reclassified to an Airport Security

Officer position, and a Custodian position was reclassified to a Mechanic Supervisor I position, to address changing personnel needs at the Airport.

FY27 Goals, Objectives and Key Performance Indicators

For FY27, the Airport Department will pursue the following goals:

- Complete the design phase for the proposed airport access road, a north-northwest extension of Jaguar Drive, and hold community meetings providing additional opportunities for public input, design alternatives submitted by the project consultant, and project cost estimates; grant funding in the amount of $4.5 million has been provided by the State of NM Department of Finance & Administration (NMDFA) for the design phase of this project via a legislative capital outlay appropriation;

- Begin design work for phase two of the Airport Terminal Expansion Project, which is estimated to cost $20 million, and leverage grant funding in the amount of $2,564,100 which has been provided by the NMDFA for this project via a legislative capital outlay appropriation;

- Commence construction and pursue FAA grant funding for the Airport Terminal East Apron Project, which will provide pavement stability and thus allow the apron to hold larger aircraft;

- Complete the Airport Master Plan, which is typically completed every eight to ten years and considers an assessment of existing conditions, aviation demand forecasts, and goals; the plan will envision the future of the Airport, including enplanement estimates, forecasting for general aviation needs, and additional services;

- Increase non-aeronautical/non-airside revenue generation by 10-15%;

- Submit the Airport Security Plan to maintain full compliance with TSA regulatory requirements; and

- Fully complete quarterly performance check-ins and expedite hiring in critical and understaffed areas.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
REGIONAL AIRPORT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	2,614,327	3,574,688	3,772,121	3,778,552	6,431	0.2%
Contractuals & Utilities	1,064,107	337,580	153,700	189,200	35,500	23.1%
Repairs & Maintenance	215,757	268,193	206,000	927,500	721,500	350.2%
Supplies	272,939	659,583	326,000	475,000	149,000	45.7%
Insurance	83,447	139,942	153,021	181,320	28,299	18.5%
Other Operating Costs	2,013,693	2,977,945	701,055	1,032,460	331,405	47.3%
Capital Purchases	80,069	96,340	70,000	1,155,000	1,085,000	1550.0%
Transfers to Other Funds	-	20,634	-	-	-	N/A
TOTAL REGIONAL AIRPORT	**6,344,339**	**8,074,904**	**5,381,897**	**7,739,032**	**2,357,135**	**43.8%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Airport Fund	6,344,339	8,074,904	5,381,897	7,739,032	2,357,135	43.8%
TOTAL REGIONAL AIRPORT	**6,344,339**	**8,074,904**	**5,381,897**	**7,739,032**	**2,357,135**	**43.8%**

PROPOSED FISCAL YEAR 2027 BUDGET

TOURISM SANTA FE

RANDY RANDALL, EXECUTIVE DIRECTOR, TOURISM SANTA FE

Mission

Tourism Santa Fe's mission is to promote economic development through tourism by positioning Santa Fe as a world-class destination that offers leisure and business travelers unique and authentic experiences in a memorable, beautiful, and culturally- and historically-significant setting.

Department Highlights, Key Services, Recent Accomplishments

Over the past year, the Tourism Department:

- Heightened the profile of Santa Fe as a tourism destination with the city ranking in Travel and Leisure Reader's Choice Poll as the top US city destination and #19 in the world ranking; Santa Fe was the only U.S. city to make the top 25 world list, and continued to be the second-most desired small city destination in the United States in the Conde Nast Reader Poll;

- Secured more than $27 million in earned media coverage for calendar year 2025, representing an $4.4 million or 18.9% increase over calendar year 2024;

- Continued the strong occupancy rates in hotels and short-term rentals, generating over $17.5 million in lodgers' tax collections;

- Maintained high occupancy and rates in hotels and short-term rentals, generating over $18 million in lodgers' tax collections;

- Successfully hosted 228 meetings and events in the CCC, resulting in the use of the facility for 285 days or 80% of the year;

- Attended 21 trade and travel shows with the department's sales team;

- Continued the security effort in the historic district, with positive results documented by hotel and retail partners; and

- Received the Leadership in Energy and Environmental Design (LEED) Gold Operations and Maintenance for Existing Buildings award.

FY27 Budget Highlights

The Tourism Department's proposed FY27 budget increased by $2 million, or 12.4%, from the original FY26 budget. The proposed FY27 budget includes $5.1 million for advertising and promotion of Santa Fe as a tourist destination and marketing for the Community Convention Center (CCC), $772,000 to promote and support various community events including Art Week, Dia de los Muertos and the Plaza Music Series, and $815,000 for security services, including $500,000 for the downtown security contract. The budget also includes one-time funding for the 250th Independence Day fireworks and drone show.

The proposed FY27 Tourism Department budget includes funding for 49 positions (49 FTE), comprised of 25 positions (25 FTE) at the Community Convention Center, and 24 positions (24 FTE) in the Visit Santa Fe Division. The budget includes $116,779 in funding for a new Assistant Operations Manager and associated equipment to address critical operational needs at the Convention Center.

FY27 Goals, Objectives and Key Performance Indicators

For FY27, the Tourism Department will pursue the following goals:

- Maintain Lodger's Tax collections above $18 million;

- Continue the advertising campaign that has played a significant role in maintaining strong levels of visitation to Santa Fe at the current record hotel and Short-Term Rental occupancy, increasing funding for this effort from $4.2 million to $5.1 million;

- Work with the Santa Fe Regional Airport and Fly Santa Fe to maintain strong passenger loads and keep the increased flight levels achieved in FY26;

- Complete the renovation of the second-floor terrace to more than double the usable area and create a link to the ground floor courtyard;

- Support the City's efforts to minimize the impact of the homeless on our most visible tourism areas of the city; and

- Work with the Planning and Land Use and Finance Departments to improve the management of short-term rentals and collection of Lodger's Tax.

COMMUNITY CONVENTION CENTER

MELANIE MOORE, CONVENTION CENTER OPERATIONS MANAGER

Division Highlights and Key Services

The Community Convention Center's mission is to offer outstanding facilities and services for business meetings, public gatherings, social events, and City meeting needs.

The Division's services include planning support, setting up and tearing down for meetings and events, facility maintenance, ongoing facility upgrades, and coordination of third-party service providers.

VISIT SANTA FE

DAVID CARR, DIRECTOR OF SALES AND JORDAN GUENTHER, MARKETING DIRECTOR

Division Highlights and Key Services

Visit Santa Fe's mission is to increase hotel and short-term rental occupancy through effective marketing to leisure travelers and direct sales efforts to groups and business meetings. The Division also seeks to support and/or create events and programs that enhance visitation.

Services provided by the Division include the management of advertising; public relations; social media; direct group sales; booking of the CCC; event creation and support; management of Occupancy Tax Advisory Board (OTAB) grants; and operation of the City's visitor centers. The Division also serves as a liaison to the Film Commission and Sister Cities Committee.

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
TOURISM SANTA FE - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Santa Fe Civic Center	5,919,304	7,321,648	8,605,275	9,368,057	762,782	8.9%
Visitors Bureau	5,807,609	7,261,247	7,663,875	8,910,731	1,246,856	16.3%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	3,386,663	3,986,931	4,136,679	4,340,017	203,338	4.9%
Contractuals & Utilities	1,295,969	2,153,482	2,241,100	2,618,700	377,600	16.8%
Repairs & Maintenance	136,189	132,177	186,000	198,040	12,040	6.5%
Supplies	220,193	216,412	224,950	873,482	648,532	288.3%
Insurance	137,973	171,541	164,531	168,743	4,212	2.6%
Other Operating Costs	5,981,009	7,224,868	6,049,807	7,564,669	1,514,862	25.0%
Capital Purchases	65,843	119,033	1,350,000	595,000	(755,000)	-55.9%
Debt Service	450,787	396,625	1,758,386	1,761,148	2,762	0.2%
Transfers to Other Funds	52,286	181,826	157,697	158,989	1,292	0.8%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Lodgers' Tax Fund	5,807,609	7,261,247	7,663,875	8,910,731	1,246,856	16.3%
Santa Fe Convention Center	5,919,304	7,321,648	8,605,275	9,368,057	762,782	8.9%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

VI. GLOSSARY OF TERMS AND ABBREVIATIONS

ACCOUNT - An entity for recording specific revenues or expenditures, or for grouping related or similar classes of revenues and expenditures and recording them within a fund or department

ACCOUNTING SYSTEM - The total set of records and procedures that are used to record, classify, and report information on the financial status and operations of the entity (See also Accrual Basis of Accounting, Modified Accrual Basis of Accounting, and Cash Basis of Accounting)

ACCRUAL BASIS OF ACCOUNTING - The method of accounting under which revenues are recorded when they are earned (whether or not cash is received at the time) and expenditures are recorded when goods and services are received (whether cash disbursements are made at the time or not)

ACTIVITY - Departmental efforts that contribute to the achievement of a specific set of program objectives; the smallest unit of the program budget

AD VALOREM TAXES - Commonly referred to as property taxes levied on both real and personal property according to the property's valuation and the tax rate

ADOPTED BUDGET - A financial plan for the fiscal year beginning July 1

ALLOT - To divide an appropriation into amounts that may be encumbered or expended during an allotment period

ANNUALIZE - To calculate the value of a resource or activity for a full year

APPROPRIATION - An authorization made by the City Council that permits the City to incur obligations and to make expenditures of resources

ARBITRAGE - The practice of taking advantage of a price difference between two or more markets

ASSESSED VALUATION - A value established on real and personal property for use as a basis for levying property taxes (Note: In New Mexico, property values are established by the County)

ASSESSMENT RATIO - The ratio at which the tax rate is applied to the tax base

ASSET - Property owned by a government or other entity that has a monetary value

ATTRITION RATE - Staffing vacancy rate in a department above the normal turnover rate as the result of retirements

AUTHORIZED POSITIONS - Employees positions that are authorized in the adopted budget to be filled during the year

AVAILABLE (UNDESIGNATED) FUND BALANCE - Funds remaining from the prior year that are available for appropriation and expenditure in the current year

BALANCED BUDGET - A budget where expenditures are equal to revenues

BEGINNING FUND BALANCE - The balance available in a fund from the end of a prior year for use in the following year

BOND - A written promise to pay a sum of money on a specific date at a specified interest rate (Note: Interest payments and the repayment of the principal are detailed in a bond ordinance)

BOND REFINANCING - The payoff and re-issuance of bonds, usually to obtain better interest rates and/or bond conditions

BUDGET - A financial plan embodying an estimate of proposed expenditures and the proposed means of financing them, usually for a single fiscal year or period

BUDGET ADJUSTMENT - A procedure to revise a budget appropriation either by the City Council approval through the adoption of a budget resolution or by a City Administrator authorization to adjust appropriations within a departmental division budget

BUDGET ADJUSTMENT REQUEST - A critical step in the formal approval process required before a revision can be made to the budget appropriation (Note: Budget adjustments of $5,000 and under shall be approved by the Finance Director, above $5,000 but no more than $50,000 shall be approved by the City Manager, and above $50,000 shall be approved by the City Council)

BUDGET CALENDAR - The schedule of key dates an entity follows in the preparation and adoption of the budget

BUDGET DOCUMENT - The official writing statement prepared by the Budget Office and supporting staff

BUDGET MESSAGE - The opening section of the budget that provides readers with a general summary of the most important aspects of the budget, including changes from the current and previous fiscal years and recommendations made by the City Manager

BUDGET ORDINANCE - The legal means to amend the adopted budget through recognizing revenue increases or decreases; transferring funds; decreasing funding of a fund or department; or providing supplemental funding to a fund or department or for the establishment of a new capital project (Note: The City Council adopts or rejects all budget ordinances)

BUDGETARY BASIS - Refers to the accounting method used to estimate financing sources and uses in the budget

BUDGETARY CONTROL - The management of a government in accordance with the approved budget for the purpose of keeping expenditures within the limitations of available appropriations and resources

BUSINESS UNIT - A cost accounting unit covering a City department, capital project, or fund

CALENDAR YEAR - The twelve-month period beginning January 1 and ending December 31

CAPITAL ASSETS - Assets of significant value and having a useful life of several years (also known as Fixed Assets.)

CAPITAL BUDGET - A capital project financial expenditure plan

CAPITAL IMPROVEMENT - Any significant physical acquisition, construction, replacement, or improvement to a City service delivery system that has a cost of $5,000 or more and a minimum useful life of two years

CAPITAL IMPROVEMENT PLAN (CIP) - The process of planning, monitoring, programming, and budgeting over a multi-year period the allocation of capital monies

CAPITAL OUTLAY - One of the expenditures account categories used for the purchase of any item with a cost of $5,000 or more and a minimum useful of two years

CAPITAL PROJECT - A cost accounting method identifying a specific project included in the CIP

CARRY FORWARD - Appropriated funds from the previous or current fiscal year that are appropriated in the next fiscal year

CASH BASIS OF ACCOUNTING - A method of accounting in which transactions are recognized only when cash is increased or decreased

CHARGES FOR SERVICES - Revenues received for services rendered

CHART OF ACCOUNTS - The classification system used by an entity to organize the accounting of various funds, programs, departments, divisions, sources, activities, and items

CITY CHARTER - Legal authority approved by the voters of the City of Santa Fe under the State of New Mexico Constitution establishing the government organization

COLLECTIVE BARGAINING AGREEMENT - A legal contract between the employer and a recognized bargaining unit for specific terms and conditions of employment

COMMODITIES - Expendable items that are consumable or have a short life span such as office supplies, fuel, minor equipment, and asphalt

CONSTANT OR REAL DOLLARS - The presentation of dollar amounts adjusted for inflation to reflect the real purchasing power of money compared to a certain point of time in the past

CONSUMER PRICE INDEX - A statistical description of price levels provided by the U.S. Department of Labor used as a measure of the increase in the cost of living (economic inflation)

CURRENT BUDGET - The original budget as approved by the City Council, along with any carryover encumbrances from the prior fiscal year and any transfers or amendments since July 1

DEBT SERVICE - The amount of revenue that must be provided for payment to insure the extinguishment of principal, interest and fees on City bonds

DEDICATED TAX - A tax levied to support a specific government program or purpose

DEFEASANCE - A provision that voids a bond or loan when the borrower sets aside cash or bonds sufficient enough to service the borrower’s debt

DEFEASE - To void, nullify, or offset a liability or debt

DEFICIT - The excess of an entity’s liabilities over assets, or the excess of expenses over revenues during an accounting period

DEPARTMENT - A major administrative division of the City that indicates overall management responsible for an operation or group of related operations

DEPRECIATION - Expiration in the service life of fixed assets attributable to wear and tear through use and lapse of time, obsolescence, inadequacy or other physical or functional cause

DISBURSEMENT - The expenditure of monies from an account

DIVISION - A sub-unit of a department which encompasses a substantial portion of the duties or activities assigned to a department

EFFECTIVENESS - Sometimes referred to as quality indicators, effectiveness measures the degree to which services are responsive to the needs and desires of customers, how well a job is performed, or how well the intent is being fulfilled

EFFICIENCY - Sometimes referred to as productivity, efficiency measures the unit cost over time, money, or labor required to produce a service

EMPLOYEE (FRINGE) BENEFITS - Contributions made by an employer to meet commitments or obligations for items such as social security, medical coverage, retirement, and other insurance plans

ENCUMBER - To set aside or commit funds for a future expenditure

ENCUMBRANCE - The legal commitment of appropriated funds to purchase an item or service

ENTERPRISE FUND - A fund established to account for operations that are financed and operated in a manner similar to private business enterprises, where the intent of the governing body is that the costs of providing goods and services to the general public on a continuing basis be financed or recovered primarily through user charges

ESTIMATED REVENUE - The amount of projected revenue to be collected during an accounting period

EXPENDITURE/EXPENSE - The outflow of funds paid for materials received or services rendered

FAIR MARKET VALUE - The value of an asset in the open market, often used to determine the assessed valuation of real property for tax purposes

FINES AND FORFEITURES - The loss of a right, money, or especially property because of one's criminal act, default, or failure or neglect to perform a duty

FISCAL YEAR - A twelve-month period to which the annual operating budget applies and at the end of which a government determines its financial position and the results of its operations (Note: The fiscal year for the City and State of New Mexico begins July 1 and ends June 30; the federal government's fiscal year begins October 1 and ends September 30)

FIXED ASSETS - Assets of long-term nature that are intended to continue to be held or used, such as land, buildings, furniture, equipment, machinery, and vehicles (also known as Capital Assets)

FROZEN POSITION – A position that is not funded, but still in the Human Resources system so that it can be re-budgeted when funding is available.

FULL-TIME EQUIVALENT - One full-time position funded for a full year or the sum of two or more part-time positions that equal the hours of a full-time position

FUNCTION - A group of related activities aimed at accomplishing a major service or regulatory program for which a government is responsible (e.g., public safety)

FUND - A fiscal and accounting entity with a self-balancing set of accounts recording cash and other financial resources as well as related liabilities and residual equities or balances

FUND BALANCE- The excess of amounts carried over from a prior accounting period plus the difference between revenues received and expenses incurred in the current period

FUNDED POSITIONS - A term referring to the number of authorized positions for which funding is included in a fiscal year budget

GANG RESISTANCE EDUCATION AND TRAINING - A prevention program built around school-based, law enforcement officer-instructed classroom curricula intended as an immunization against delinquency, youth violence, and gang membership

GENERAL FUND - The largest fund within the City, it accounts for most of the financial resources and day-to- day operations of the government not specifically accounted for in other funds

GENERAL OBLIGATION BONDS - Long-term debt instruments issued by State and local governments to raise funds for capital improvements

GENERALLY ACCEPTED ACCOUNTING PRINCIPLES - A collection of commonly-followed accounting rules and standards for financial reporting

GEOGRAPHIC INFORMATION SYSTEM - An integrated system of computer hardware and software used for storage, retrieval, mapping, and analysis of referenced geographic data

GOAL - A statement of broad direction, purpose or intent

GOVERNMENTAL ACCOUNTING STANDARDS BOARD - The source of generally accepted accounting principles used by State and local governments

GRANT - A sum of money given to a person or entity, usually identified for a specific purpose

IMPACT FEE - Payments required by local governments of new development for the purpose of providing new or expanded public capital facilities such as roads, parks, bikeways, trails, police and fire stations, water and wastewater utilities, and drainage

INDIRECT COST - Costs that are not directly accountable to a cost objective, frequently referred to as overhead, general, and administrative expenses

INFRASTRUCTURE - The fundamental facilities and systems serving a local, State or Federal government, such as roads, bridges, tunnels, water supply, sewers, electrical grids, and telecommunications

INFRASTRUCTURE CAPITAL IMPROVEMENT PLAN - Capital projects proposed to be undertaken within the next five fiscal years identifying estimated costs and potential funding sources

INTERGOVERNMENTAL AGREEMENT - An agreement that involves or is made between two or more governments in cooperation to address issues of mutual concern

INTERGOVERNMENTAL REVENUE - Funds received from Federal, State and other local government sources in the form of grants, shared revenues, and payments in lieu of taxes

INTERNAL SERVICE FUND - A fund used in governmental accounting to track goods and services shifted between departments on a cost-reimbursement basis

LEVY - To impose taxes for the support of government activities

LICENSES AND PERMITS - Permission or authorization to do something or use something, usually resulting in a fee imposed upon the holder

LINE ITEM - A specific account used to budget and record revenues or expenditures

LONGEVITY - Employee compensation payments made in recognition of a certain number of years of employment with the same entity

LONG-TERM DEBT - Debt with a maturity date greater than one year from the date of issuance

MANDATE - A requirement imposed by a legal act of the Federal, State, or local government

MATERIALS AND SERVICES - Commodities which are consumed or materially altered when used, such as office or operating supplies, or when a vendor renders a service, such as consulting or in connection with a repair or maintenance of an asset

MEASURE - A plan of action taken to achieve a particular purpose or a standard used to express the size, amount, or degree of something

MILL - A property tax rate based on the assessed valuation of real property, e.g., a tax rate of one mill produces one dollar of taxes on each $1,000 of assessed valuation

MISCELLANEOUS REVENUE - Revenue that is not identified separately in the chart of accounts

MISSION STATEMENT - A formal summary articulating an organization's purpose, identifying the scope of its operations and the kind of product or service it provides

MODIFIED ACCRUAL BASIS OF ACCOUNTING - The method combining the accrual basis of accounting with the cash basis of accounting in which revenues are recognized when they are both measurable and available but expenditures are recognized when a liability is incurred

NOMINAL DOLLARS - The presentation of dollar amounts not adjusted for inflation

OBJECT OF EXPENDITURES - The lowest and most detailed level of expenditure classification, such as electricity, office supplies, asphalt, and furniture

OBJECTIVE - Something to be accomplished in specific, well-defined, and measurable terms, often including a specific timeframe in which the objective will be achieved

OBLIGATIONS - Commitments which a person or entity may be legally obligated to meet

OPERATING BUDGET - A combination of known expenses, expected future costs, and forecasted revenue over the course of a year stated in terms of functional categories and accounts

OPERATING EXPENSES - A category of expenditures an entity incurs as a result of performing operations, such as salaries, employee benefits, contracted services, supplies, and commodities

OPERATING REVENUE - Funds that the government receives to pay for operating expenses

ORDINANCE - A formal legislative enactment by a City Council, having the full force and effect of law within the City boundaries unless it is in conflict with a higher form of law (Note: An Ordinance has higher legal standing than a Resolution)

ORIGINAL BUDGET - The initial adopted budget for an entity that has not been revised or amended

OUTPUT INDICATOR - A unit of work accomplished, without reference to the resources required to do the work (e.g. number of permit issued, or number of arrests made), not necessarily meant to reflect the effectiveness or efficiency of the work performed

PART-TIME EQUIVALENT - A position that is not considered full-time

PAYMENT IN LIEU OF TAXES - A payment made to compensate a government for some or all of the property tax revenue lost due to tax-exempt ownership or use of real property

PERSONAL SERVICES - Salary and wage-related costs of salaried and hourly employees

PILOT - Payment In Lieu Of Taxes

PROGRAM - A group of related activities performed by one or more organizational units for the purpose of accomplishing a function for which the government is responsible

PROJECT NUMBER - A unique identifier of any special activity, especially where specific reporting requirements exist regarding the activity, often used with capital projects or grants

PURCHASE ORDER - A document issued by a buyer to a seller indicating type, quantity, and pricing for a product or service, resulting in an encumbrance in the buyer's accounting records

PURPOSE - A broad statement of goals or objectives specifying the reason for which something exists or is done

RESERVE - An account used to indicate that portion of fund equity which is legally restricted for a specific purpose and is, therefore, not available for general appropriation

RESOLUTION - A special order by the City Council dealing with matters of a special or temporary nature

RESOURCES - The total amount available for appropriation, including estimated revenues, fund transfers, and beginning balances

REVENUE - The yield from sources of income (such as taxes, licenses, fines, etc.) that the City collects and receives into the treasury for current or future use

REVENUE BOND - A municipal bond that finances income-producing projects and is secured by a specified revenue source, such as Gross Receipts Tax

REVENUE ESTIMATE - The funds projected to accrue during an accounting period, whether or not all of it is expected to be collected during that period

SEVEN MAJORS - Crimes reported to the Federal Bureau of Investigation (FBI), including homicide, robbery, motor vehicle theft, aggravated assault/battery, burglary, larceny, and rape

SHARED REVENUE - Taxes collected Federal or State governments that are allocated back to local governments

SINKING FUND - An account used to periodically set aside money for the gradual repayment a debt

SPAN OF CONTROL - The number of subordinates a supervisor has, expressed as a ratio of supervisor to subordinates

SPECIAL ASSESSMENT DISTRICT - The geographical area a government uses to designate a unique tax to help pay for certain public projects

SPECIAL REVENUE FUND - An account established by a government to collect money that must be used for a specific project

STRATEGIC PLAN - A systematic process of envisioning a desired future, translating that vision into broadly defined goals or objectives, and developing a sequence of steps to achieve them

SYSTEM CONTROL AND DATA ACQUISITION - A radio system for monitoring and managing the City's water and wastewater facilities

TAX - A compulsory contribution levied by a government

TAX LEVY - The amount imposed or assessed by a government on a real property owner or on a consumer or seller engaging in a business transaction

TRANSFER IN/OUT - Amounts moved from one fund or department to another

UNENCUMBERED BALANCE - The amount of an appropriation that is neither expended nor encumbered and is, therefore, still available for future use

UNRESERVED FUND BALANCE - The portion of a fund's remaining resources that is not restricted for a specific purpose and is, therefore, available for appropriation

USER FEE - A sum of money paid by an individual choosing to access a service or facility (e.g., swimming pools)

WORKLOAD INDICATOR - A unit of work to be done (e.g., number of permit applications received)

XERISCAPE - A style of landscape design requiring little or no irrigation, often used in arid regions

ABBREVIATIONS

AARP - American Association of Retired Persons
ACA - Affordable Care Act
ADA - Americans with Disabilities Act
ADO - Asset Development Office
AFSCME - American Federation of State, County, and Municipal Employees
AI - Artificial Intelligence
AIS - Annual Information Statement
ALGA - Association of Local Government Auditors
APA - American Planning Association
ARFF - Aircraft Rescue and Firefighting
ARPA - American Rescue Plan Act
ARRA - American Recovery and Reinvestment Act
ASD - Administrative Support Division (ITT Department)
ASE - Automotive Service Excellence
ASL - American Sign Language
ATV - All-Terrain Vehicle
BAR - Budget Amendment Resolution
BDD - Buckman Direct Diversion
BIPOC - Black, Indigenous, Person of Color
BRA - Business Retention & Expansion
BuRRT - Buckman Road Recycling and Transfer station
CAD - Computer-Aided Design
CAF - Corrective Action Fund
CAFR - Comprehensive Annual Financial Report
CAO - City Attorney's Office
CAPER - Consolidated Action and Performance Evaluation Report
CBA - Collective Bargaining Agreement
CC - City Council
CCC - Community Convention Center
CDBG - Community Development Block Grant
CDL - Commercial Driver's License
CEMP - Comprehensive Emergency Management Plan

CERT - Community Emergency Response Team

CIAC - Capital Improvement Advisory Committee

CIP - Capital Improvement Plan (or Capital Improvement Project)

CIPCAC - Capital Improvement Plan Citizen's Advisory Committee

CIPTAC - Capital Improvement Plan Technical Advisory Committee

CISA - Certified Information Systems Auditor

CLG - Certified Local Government

CM - City Manager

CMO - Collateralized Mortgage Obligation

CNG - Compressed Natural Gas

CNT - Crisis Negotiation Team

COD - Chemical Oxygen Demand

COG - Continuity Of Government

COOP - Continuity Of Operations

COLA - Cost Of Living Adjustment

CPO - Chief Procurement Officer

CPR - Cardiopulmonary Resuscitation

CRM - Customer Relationship Management

CRWTP - Canyon Road Water Treatment Plant

CVB - Convention and Visitors Bureau

CY - Calendar Year

DFA -Department of Finance and Administration (State of New Mexico)

DHSEM - Department of Homeland Security and Emergency Management (State of New Mexico)

DOJ - Department of Justice

DOT - Department of Transportation (State of New Mexico)

DPS - Department of Public Safety (State of New Mexico)

DPSA - Department of Public Safety Association

DRT - Development Review Team

DUI - Driving Under the Influence of intoxicating liquor

DVP - Delivery Versus Payment

DWI - Driving While under the Influence of intoxicating liquor or drugs

EAP - Employee Assistance Program

EDAC – Economic Development Advisory Committee
EUSD - Enterprise Application Services Division (ITT Department)
EGRT - Environmental Gross Receipts Tax
EMMA - Electronic Municipal Market Access
EMPG - Emergency Management Performance Grant
EMS - Emergency Medical Services
EMT - Emergency Medical Technician
ENA - Exclusive Negotiation Agreement
EOC - Emergency Operations Center
EOD - Explosive Ordinance Disposal
EOP - Emergency Operations Plan
EPA - Environmental Protection Agency
ERP - Enterprise Resource Planning
ESD - Environmental Services Division
ESWTR - Enhanced Surface Water Treatment Rule
EUSD - End User Services Division (ITT Department)
EVTCC - Emergency Vehicle Technician Certification Commission
FAA - Federal Aviation Administration
FBI - Federal Bureau of Investigation
FBO - Fixed Base Operator
FCC - Federal Communications Division
FDIC - Federal Deposit Insurance Corporation
FEMA - Federal Emergency Management Agency
FF and E - Furniture, Fixtures, and Equipment
FFY - Federal Fiscal Year
FGP - Foster Grandparents
FHWA - Federal Highway Administration
FIDS - Flight Information Display System
FINRA - Financial Industry Regulatory Authority
FT - Full-Time
FTA - Federal Transit Administration
FTE - Full-Time Equivalent
FY - Fiscal Year

GAAP - Generally Accepted Accounting Principles
GAGAS - Generally Accepted Government Auditing Standards
GASB - Governmental Accounting Standards Board
GCCC - Genoveva Chavez Community Center
GFOA - Government Finance Officers Association
GIS - Geographic Information System
GO BONDS - General Obligation Bonds
GOAL - A statement of broad direction, purpose or intent
GPRGC - Grandparents Raising Grandchildren
GPS - Global Positioning System
GREAT - Gang Resistance Education And Training
GRT - Gross Receipts Tax
HPD - Historic Preservation Division
HR - Human Resources Department
HRB - Human Rights Bureau
HUD - U.S. Office of Housing and Urban Development
HVAC - Heating, Ventilation and Air Conditioning
IAIA - Institute of American Indian Arts
IATSE – International Alliance of Theatrical Stage Employees
ICIP - Infrastructure Capital Improvement Plan
IFSAC - International Fire Services Accreditation Congress
IGA - Intergovernmental Agreement
IP - Industrial Pretreatment
IPRA - Inspection of Public Records Act
IRS - Internal Revenue Service
ISACA - Information Systems Audit and Control Association
ISC - Interstate Stream Commission
ISD - Infrastructure Services Division (ITT Department)
IT - Information Technology
ITSM - Information Technology Service Management
ITT - Information Technology and Telecommunications Department
JAG - Justice Assistance Grant
JPA - Joint Powers Agreement

KSFB - Keep Santa Fe Beautiful

LANL - Los Alamos National Laboratory

LED - Light Emitting Diode

LEDA - Local Economic Development Act

LEED – Leadership in Energy and Environmental Design

LEEDA - Law Enforcement Executive Development Association

LEPF - Law Enforcement Protection Fund

LGD - Local Government Division (State of New Mexico Department of Finance and Administration)

LGIP - Local Government Investment Pool

LIHTC - Low Income Housing Tax Credit

LINC - Local Innovation Corridor`

MEG - Mary Esther Gonzales Senior Center

MEP - Mechanical, Electrical and Plumbing

MIH - Mobile Integrated Health

MIHO - Mobile Integrated Health Office

MOU - Memorandum Of Understanding

MOW - Meals On Wheels

MPA - Metropolitan Planning Area

MPO - Metropolitan Planning Organization

MRA - Metropolitan Redevelopment Agency

MRC - Municipal Recreation Complex

MSGP - Multi-Sector General Permit

MSL - Marty Sanchez Links de Santa Fe Golf Course

MSRB - Municipal Securities Rulemaking Board

MTP - Metropolitan Transportation Plan

NASPO - National Association of State Procurement Officials

NCS - National Citizens Survey

NCUA - National Credit Union Administration

NEA - National Endowment for the Arts

NM - New Mexico

NMAC - New Mexico Administrative Code

NMED - New Mexico Environment Department

NMFA - New Mexico Finance Authority
NMGAS - New Mexico Gas Company
NMGL - New Mexico Golf Limited
NMML - New Mexico Municipal League
NMORCA - New Mexico Organized Retail Crime Association
NMRPA - New Mexico Recreation and Park Association
NMSA - New Mexico Statutes Annotated
NMSD - New Mexico School for the Deaf
NMWWA - New Mexico Wastewater Association
NOAA - National Oceanic and Atmospheric Association
NPDES - National Pollutant Discharge Elimination System
NRCS - National Resources Conservation Service
NRPA - National Recreation and Park Association
NSIP - Nutrition Service Incentive Program
NWS - National Weather Service
NYU - New York University
OAH - Office of Affordable Housing
OBG - Office for Business Growth
OED - Office of Economic Development
OEM - Office of Emergency Management
O and M (or O&M) - Operating and Maintenance
OSE - Office of the State Engineer (State of New Mexico)
OTAB - Occupancy Tax Advisory Board
PAM - Privileged Access Management
PARCS - Parking Access and Revenue Control System
P-CARD - Procurement Card
PCR - Police Community Relations
PERA - Public Employees Retirement Association
PILOT - Payment In Lieu Of Taxes
PIO - Public Information Officer
PMO - Project Management Office (ITT Department)
PNM - Public Service Company of New Mexico
PO - Purchase Order

POS - Point Of Sale
POTW - Publically Owned Treatment Works
PPE - Personal Protective Equipment
PRV - Pressure Reducing Valve
PT - Part-Time
PTE - Part-Time Equivalent
PTTMP - Part-Time Temporary
PWD - Public Works Department
QWEL - Qualified Water Efficient Landscaper
RDC - Regional Development Cooperation
RFP - Request for Proposal
RFQ - Request for Quote
ROW - Right of way
RSVP - Retired Senior Volunteer Program
RTCR - Revised Total Coliform Rule
SAD - Special Assessment District
SAFE - Security Assistance for Enterprises
SBDC - Small Business Development Center
SCADA - Supervisory Control And Data Acquisition
SCBA - Self-Contained Breathing Apparatus
SCORE - Service Corp Of Retired Executives
SCP - Senior Companion Program
SEC - Securities and Exchange Commission
SEP - Senior Employment Program
SFBI - Santa Fe Business Incubator
SFCC - Santa Fe City Code or Santa Fe Community College
SFFD - Santa Fe Fire Department
SFFO - Santa Fe Film Office
SFGTV-28 - Santa Fe Government access cable Television channel 28
SFHP - Santa Fe Homes Program
SFPD - Santa Fe Police Department
SFPS - Santa Fe Public Schools
SFSWMA (or SWMA) - Santa Fe Solid Waste Management Agency

SFUAD - Santa Fe University of Art and Design
SIU - Significant Industrial User
SLO - State Land Office (State of New Mexico)
SNAG - Starting New At Golf
SSD - Senior Services Division
SWAT - Special Weapons And Tactics
SWOT - Strengths, Weaknesses, Opportunities, Threats
TAT - TMDL and Assessment Team
TBAR - Technical Budget Adjustment Request
TBBL - Technically Based Local Limit
TEMS - Tactical Emergency Medical Service
TIC - True Interest Cost
TIP - Transportation Improvement Plan
TMDL - Total Maximum Daily Load
TPPR - Third Party Plan Review
TSA - Transportation Security Administration
TSF - Tourism Santa Fe
TSS - Total Suspended Solids
TWAS - Thickened Waste Activated Sludge
UCS - Utility Customer Service Division
UNESCO - United Nations Educational, Scientific and Cultural Organization
UPS - United Parcel Service
UPWP - Unified Planning Work Program
USFS - United States Forest Service
UTO - Uniform Traffic Ordinance
WIPP - Waste Isolation Pilot Plant

APPENDIX A

ADOPTED STRATEGIC GOALS
AND FY27 BUDGET PRIORITIES

CITY OF SANTA FE

Goals and Budget Priorities

Adopted February 11, 2026

Four Year Strategic Goals:

1. City of Santa Fe will serve the whole community by **supporting development of more housing across the continuum of needs, with a focus on affordable and attainable housing.**

2. City of Santa Fe will **invest in improving city systems and infrastructure to ensure efficient and effective use of city resources, which will enhance service delivery and customer service.** This may include streamlining internal processes and procedures, leveraging technology for better asset management, prioritizing data-driven decision making, and recruiting and retaining highly qualified city staff.

3. **City of Santa Fe will work to reduce crime and increase public safety.** This may include ensuring safer streets, crosswalks and corridors, noise and speed enforcement to reduce traffic and pedestrian accidents and to enhance quality of life, and strategic policing efforts to reduce crime and ensure public safety.

FY 27 Budget Priorities: Aligning Expenditures with City Strategic Goals

After discussing the Four-Year Strategic Goals and considering public input from the January 8 community budget workshop, Governing Body members expressed the following as key priorities for the FY27 (2026-27) city budget.

1. **Support Affordable and Attainable Housing**
   Support development of more housing across the continuum of needs, with a focus on affordable and attainable housing, including support for wrap-around services.
   Strategies may include:
   a. Convening and aligning with partners to develop an overall strategy for addressing needs for unhoused individuals and families in our community, including wrap-around/supportive services.
   b. Partnering with the private sector and non-profit developers to encourage development of more affordable housing of various types.

2. **Improve City Efficiency, Effectiveness and Service Delivery**
   Invest in improving city systems and infrastructure to ensure efficient and effective use of city resources, to improve service delivery and customer service. Strategies include:
   a. Identify city processes and procedures that are overly burdensome and unnecessary that can be streamlined and modernized.
   b. Utilize technology tools for asset management to ensure optimal decision-making for care and replacement of city assets (streets, water/wastewater infrastructure, fleet management, facilities and more).
   c. Invest in city staff to reduce turnover, recruit and retain highly qualified personnel, and improve opportunities for advancement and professional development.

3. **Reduce Crime and Increase Public Safety**
   Focus on Measures to Reduce Crime and Increase Public Safety: Programs and projects that focus on enhancing safety throughout the community are high priority. Initiatives may include:
   a. Design, construct and maintain public infrastructure to ensure safer streets and crosswalks and corridors. Prioritize pedestrian and bicycle safety and development of an "age friendly" community.
   b. Implement automatic camera enforcement technology to address noise and speed issues in key areas to reduce traffic and pedestrian/bicycle accidents and to enhance quality of life
   c. Enhance strategic and community policing efforts to reduce crime and support public safety.

City of Santa Fe

200 Lincoln Avenue

Santa Fe, NM 87501

PROPOSED FISCAL YEAR 2027 BUDGET

ALL FUNDS SUMMARY

CITY OF SANTA FE
ALL FUNDS - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Local/State-Shared Taxes:							
-Gross Receipts Tax	158,080,046	169,534,967	173,964,469	167,400,000	178,537,742	11,137,742	6.7%
-Property Tax	12,149,080	12,502,649	12,767,886	13,171,757	14,601,857	1,430,100	10.9%
-Franchise Fees	5,668,146	5,291,041	5,418,561	5,647,741	5,586,036	(61,705)	-1.1%
-Lodgers' Tax	19,948,448	16,229,165	17,923,699	18,000,001	18,128,020	128,019	0.7%
-Gasoline Tax	1,561,558	1,631,126	1,452,729	1,680,000	1,587,951	(92,049)	-5.5%
-Other Taxes	1,206,662	1,304,150	1,240,722	1,308,468	1,263,170	(45,298)	-3.5%
Subtotal - Taxes	*198,613,941*	*206,493,099*	*212,768,067*	*207,207,967*	*219,704,776*	*12,496,809*	*6.0%*
Licenses & Permits:							
-Business Licenses	912,765	758,008	751,396	816,300	691,827	(124,473)	-15.2%
-Building/Zoning Permits	3,945,947	4,790,704	4,214,670	3,155,000	3,755,000	600,000	19.0%
-Other Licenses & Permits	171,689	141,734	184,559	155,000	182,126	27,126	17.5%
Subtotal - Licenses & Permits	*5,030,400*	*5,690,446*	*5,150,625*	*4,126,300*	*4,628,953*	*502,653*	*12.2%*
Fees & Service Charges:							
-Airport Fees	2,051,120	2,156,373	3,446,571	5,002,630	6,378,000	1,375,370	27.5%
-Ambulance Fees	4,649,371	3,820,330	7,362,487	5,114,308	5,887,781	773,473	15.1%
-Civic Center Fees	629,296	416,855	785,551	583,000	895,000	312,000	53.5%
-Housing Fees	978,427	1,608,969	1,431,062	877,540	833,000	(44,540)	-5.1%
-Impact Fees	2,574,677	4,286,993	1,558,901	3,827,254	4,478,138	650,884	17.0%
-Insurance Premiums	27,542,821	32,828,591	34,095,408	32,798,891	35,145,184	2,346,293	7.2%
-Meals Fees	80,247	65,244	57,989	77,400	77,400	-	0.0%
-Parking Fees	3,918,405	4,843,050	4,883,143	5,150,500	5,450,000	299,500	5.8%
-Planning/Land Use Fees	449,523	165,009	1,162,565	694,500	540,200	(154,300)	-22.2%
-Police/Court Fees	626,617	592,138	904,166	474,392	561,403	87,011	18.3%
-Public Transportation Fees	229,089	238,753	219,315	235,500	249,630	14,130	6.0%
-Recreation Fees	2,204,704	3,096,693	3,702,744	3,357,349	3,403,150	45,801	1.4%
-Solid Waste Fees	15,473,829	16,147,451	16,685,357	16,550,529	15,514,942	(1,035,587)	-6.3%
-Wastewater Fees	18,476,058	15,154,599	15,004,927	13,993,545	14,061,673	68,128	0.5%
-Water Fees	35,764,431	43,710,877	38,642,717	37,727,253	37,870,396	143,143	0.4%
-Reimbursed Expenses	14,880,751	21,359,460	22,944,169	23,694,431	34,517,460	10,823,029	45.7%
-Other Fees/Services	755,503	3,587,030	3,968,337	3,918,896	3,716,021	(202,875)	-5.2%
Subtotal - Fees & Services	*131,284,868*	*154,078,417*	*156,855,409*	*154,077,918*	*169,579,378*	*15,501,460*	*10.1%*
Fines & Forfeitures:							
-Parking Fines	533,465	460,469	448,621	525,000	525,000	-	0.0%
-Violations Fines	16,271	16,647	10,779	16,653	16,653	-	0.0%
-Other Fines & Forfeitures	190,220	155,698	120,448	153,750	153,450	(300)	-0.2%
Subtotal - Fines & Forfeitures	*739,956*	*632,815*	*579,848*	*695,403*	*695,103*	*(300)*	*0.0%*

[Continued next page]

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
ALL FUNDS - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
[Revenues by Category - continued]							
Rents/Royalties/Concessions:							
-Airport Rentals	(5,599)	(112,796)	68,959	170,000	400,600	230,600	135.6%
-Equipment Rentals	34,269	25,553	21,653	27,000	27,000	-	0.0%
-Parks & Recreation - Rentals	283,510	295,116	250,831	302,750	302,750	-	0.0%
-Other Rentals	2,435,262	3,018,972	2,152,001	3,753,635	3,185,608	(568,027)	-15.1%
Subtotal - Rents/Royalties	*2,747,441*	*3,226,844*	*2,493,443*	*4,253,385*	*3,915,958*	*(337,427)*	*-7.9%*
Miscellaneous Revenues:							
-Insurance Recoveries	6,971	96,659	-	100,000	100,000	-	0.0%
-Sales Revenue	698,130	1,090,468	1,426,691	1,322,024	112,840	(1,209,184)	-91.5%
-Other Misc. Revenue	4,138,531	2,309,196	(1,461,974)	4,959,688	6,853,574	1,893,886	38.2%
Subtotal - Miscellaneous	*4,843,631*	*3,496,323*	*(35,282)*	*6,381,712*	*7,066,414*	*684,702*	*10.7%*
Intergovernmental Grants:							
-State Grants	4,675,031	4,668,053	8,944,961	5,479,143	6,427,469	948,326	17.3%
-Federal Grants	4,216,318	8,878,828	11,340,342	4,312,383	7,170,773	2,858,390	66.3%
-SF County Grants	(12,144)	70,487	478,364	244,698	252,092	7,394	3.0%
-Other Grants	10,000	20,000	228,223	-	1,642,023	1,642,023	N/A
Subtotal - Intergovernmental	*8,889,205*	*13,637,368*	*20,991,891*	*10,036,224*	*15,492,357*	*5,456,133*	*54.4%*
Interest on Investments	1,880,058	11,977,762	15,608,940	14,965,784	12,820,647	(2,145,137)	-14.3%
Transfers In	54,330,427	68,494,322	86,446,134	79,777,933	79,216,531	(561,402)	-0.7%
TOTAL REVENUES	**408,359,928**	**467,727,396**	**500,859,075**	**481,522,626**	**513,120,117**	**31,597,491**	**6.6%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

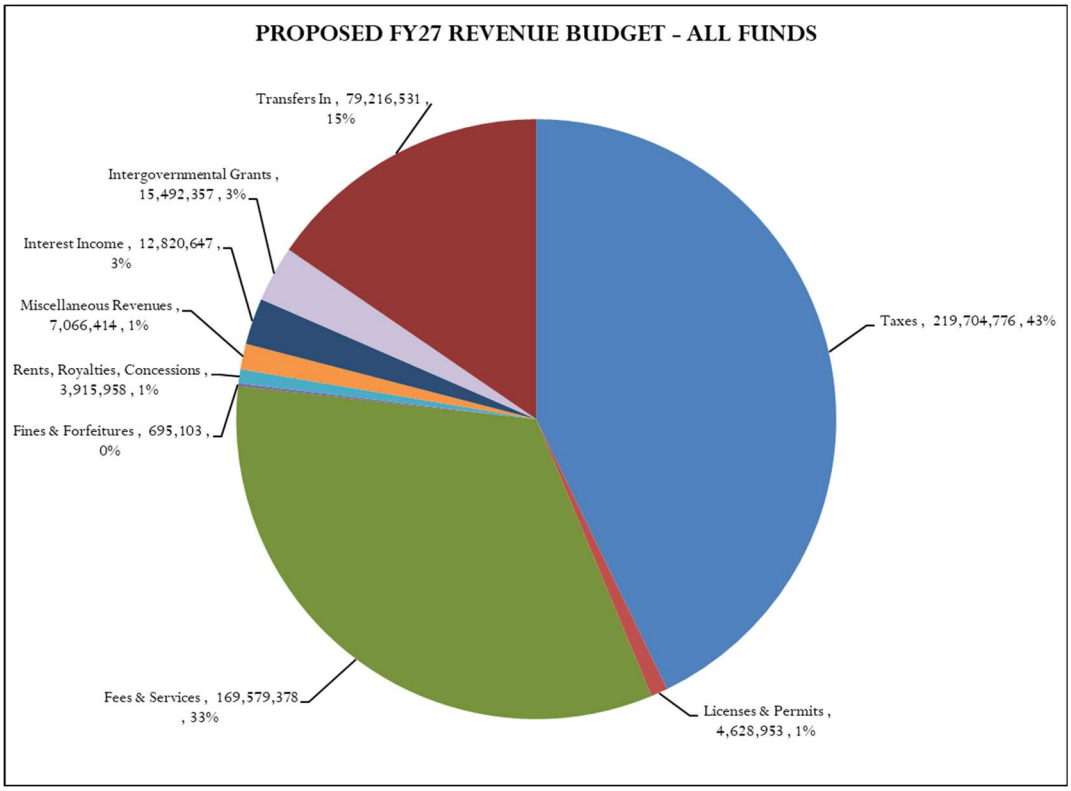
PROPOSED FISCAL YEAR 2027 BUDGET

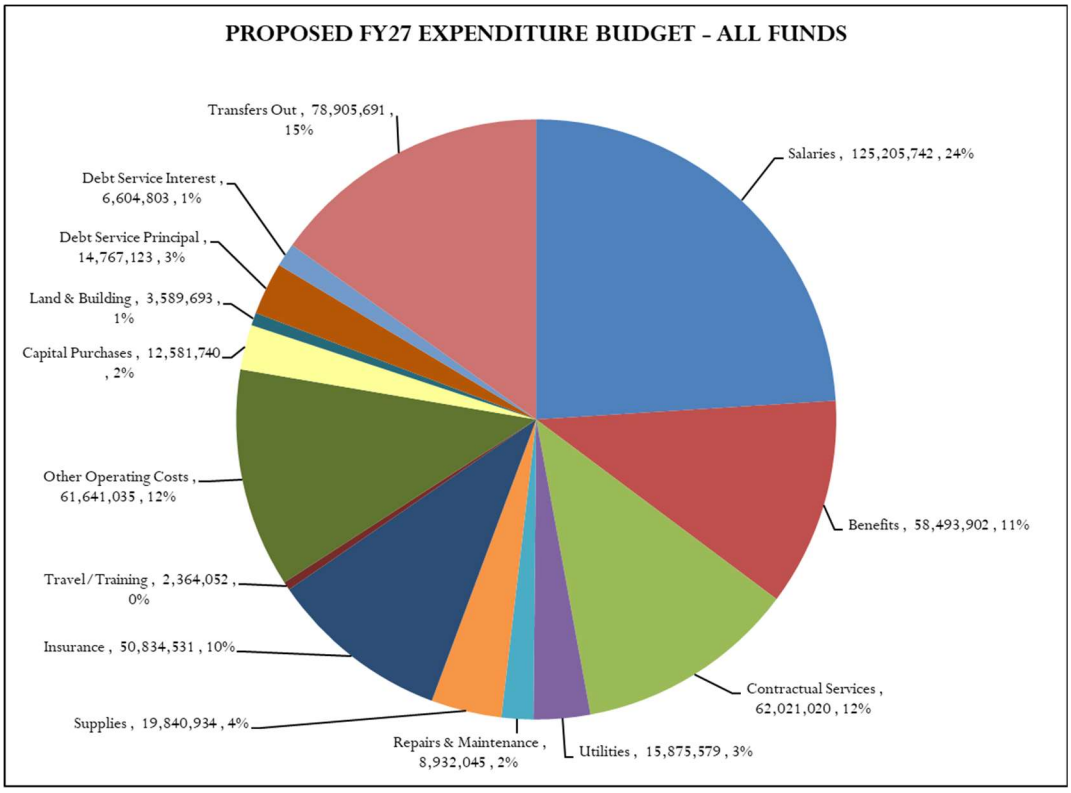
CITY OF SANTA FE
ALL FUNDS - EXPENDITURES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Personnel Services:							
-Salaries	87,006,557	94,031,822	104,388,361	114,831,571	125,205,742	10,374,171	9.0%
-Benefits	25,923,600	42,861,499	49,165,065	55,459,448	58,493,902	3,034,454	5.5%
Subtotal - Personnel Services	*112,930,157*	*136,893,321*	*153,553,426*	*170,291,019*	*183,699,644*	*13,408,625*	*7.9%*
Operating Expenses:							
-Contractual Services	33,117,885	39,728,204	42,813,653	49,028,138	62,021,020	12,992,882	26.5%
-Utilities	14,259,390	14,607,707	14,642,568	16,763,777	15,875,579	(888,198)	-5.3%
-Repairs & Maintenance	7,213,214	6,973,357	7,896,216	10,321,906	8,932,045	(1,389,861)	-13.5%
-Supplies	12,229,321	12,434,704	13,979,996	15,718,939	19,840,934	4,121,995	26.2%
-Insurance	31,911,781	38,610,663	40,520,644	47,887,157	50,834,531	2,947,374	6.2%
-Travel/Training	1,075,678	1,185,636	1,448,718	1,854,329	2,364,052	509,723	27.5%
-Other Operating Costs	54,112,499	63,364,261	62,938,270	51,633,782	61,641,035	10,007,253	19.4%
Subtotal - Operating Expenses	*153,919,768*	*176,904,532*	*184,240,065*	*193,208,028*	*221,509,196*	*28,301,168*	*14.6%*
Capital Outlay:							
-Capital Purchases	159,528	9,550,555	11,431,827	10,890,068	12,581,740	1,691,672	15.5%
-Land & Building	960,535	3,456,527	5,686,821	3,306,443	3,589,693	283,250	8.6%
Subtotal - Capital Outlay	*1,120,062*	*13,007,082*	*17,118,648*	*14,196,511*	*16,171,433*	*1,974,922*	*13.9%*
Debt Service:							
-Principal	8,250,699	8,916,053	9,221,175	16,476,768	14,767,123	(1,709,645)	-10.4%
-Interest	8,179,800	7,412,736	6,735,646	6,084,329	6,604,803	520,474	8.6%
-Other Debt Service	(970,457)	(825,913)	(680,358)	-	-	-	N/A
Subtotal - Debt Service	*15,460,042*	*15,502,877*	*15,276,463*	*22,561,097*	*21,371,926*	*(1,189,171)*	*-5.3%*
Transfers Out	63,855,814	83,144,147	111,814,252	80,332,737	78,905,691	(1,427,046)	-1.8%
TOTAL EXPENDITURES	**347,285,844**	**425,451,958**	**482,002,854**	**480,589,392**	**521,657,890**	**41,068,498**	**8.5%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

PROPOSED FISCAL YEAR 2027 BUDGET





PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
ALL FUNDS - EXPENDITURES BY DEPARTMENT
FY 2022/23 THROUGH FY 2026/27

DEPARTMENT	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Community Engagement	2,468,480	2,796,069	2,716,823	3,827,614	3,645,850	(181,764)	-4.7%
Community Services	25,811,343	33,840,445	42,646,397	40,308,146	42,874,349	2,566,203	6.4%
Economic Development	5,924,665	7,569,183	11,536,605	7,984,187	8,952,581	968,394	12.1%
Emergency Management	430,590	542,307	560,952	948,098	1,103,460	155,362	16.4%
Finance	25,294,836	29,116,965	32,688,516	26,326,485	22,822,599	(3,503,886)	-13.3%
Fire	25,639,372	30,823,543	39,409,906	35,903,389	40,963,356	5,059,967	14.1%
General Government	14,972,717	15,942,012	16,678,851	21,217,755	24,467,977	3,250,222	15.3%
Human Resources	27,425,845	28,000,468	27,945,254	32,349,993	33,784,182	1,434,189	4.4%
Info. Tech. & Telecomm.	11,430,812	15,506,239	18,741,662	15,019,557	23,845,686	8,826,129	58.8%
Metropolitan Redevelopment Agency	-	98,838	571,648	594,555	674,847	80,292	13.5%
Planning & Land Use	17,007,036	14,228,688	17,936,446	16,976,182	18,756,281	1,780,099	10.5%
Police	28,940,437	39,775,400	41,639,201	42,113,479	47,831,668	5,718,189	13.6%
Public Utilities	65,344,464	74,800,912	74,931,476	100,717,264	100,463,840	(253,424)	-0.3%
Public Works	50,087,150	66,786,259	83,582,014	71,744,063	80,731,969	8,987,906	12.5%
Regional Airport	3,123,353	6,344,339	8,074,904	5,381,897	7,739,032	2,357,135	43.8%
TOURISM Santa Fe	10,054,083	11,726,913	14,582,895	16,269,150	18,278,788	2,009,638	12.4%
*Non-Departmental**	*33,330,661*	*47,553,380*	*47,759,306*	*42,907,578*	*44,721,425*	1,813,847	4.2%
TOTAL EXPENDITURES	**347,285,844**	**425,451,958**	**482,002,854**	**480,589,392**	**521,657,890**	**41,068,498**	**8.5%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

PROPOSED FISCAL YEAR 2027 BUDGET

GENERAL FUND SUMMARY

CITY OF SANTA FE
GENERAL FUND - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Local/State-Shared Taxes:							
-Gross Receipts Tax	98,962,863	106,133,722	108,907,004	104,797,172	111,103,376	6,306,204	6.0%
-Property Tax	9,516,085	10,270,979	10,811,408	11,197,436	11,499,013	301,577	2.7%
-Franchise Fees	5,607,490	5,236,545	5,366,831	5,580,741	5,586,036	5,295	0.1%
-Other Taxes	1,206,662	1,304,150	1,240,722	1,308,468	1,263,170	(45,298)	-3.5%
Subtotal - Taxes	*115,293,100*	*122,945,396*	*126,325,966*	*122,883,817*	*129,451,595*	*6,567,778*	*5.3%*
Licenses & Permits:							
-Business Licenses	912,765	758,008	751,396	816,300	691,827	(124,473)	-15.2%
-Building/Zoning Permits	3,945,937	4,790,704	4,214,670	3,155,000	3,755,000	600,000	19.0%
-Other Licenses & Permits	164,389	133,984	177,529	138,000	165,126	27,126	19.7%
Subtotal - Licenses & Permits	*5,023,090*	*5,682,696*	*5,143,595*	*4,109,300*	*4,611,953*	*502,653*	*12.2%*
Fees & Service Charges:							
-Ambulance Fees	4,649,371	3,820,330	7,362,487	5,114,308	5,887,781	773,473	15.1%
-Impact Fees	2,800	-	-	3,000	3,000	-	0.0%
-Planning/Land Use Fees	299,523	315,009	1,162,565	694,500	540,200	(154,300)	-22.2%
-Police/Court Fees	32,531	24,098	259,247	30,989	20,000	(10,989)	-35.5%
-Recreation Fees	296,206	329,153	337,588	315,350	315,350	-	0.0%
-Reimbursed Expenses	5,427,430	6,761,864	6,807,486	8,807,129	9,691,459	884,330	10.0%
-Other Fees/Services	80,058	82,722	108,105	303,500	167,905	(135,595)	-44.7%
Subtotal - Fees & Services	*10,787,919*	*11,333,176*	*16,037,479*	*15,268,776*	*16,625,695*	*1,356,919*	*8.9%*
Fines & Forfeitures:							
-Violations Fines	9,413	494	459	500	500	-	0.0%
-Other Fines & Forfeitures	137,443	98,942	73,799	103,600	103,600	-	0.0%
Subtotal - Fines & Forfeitures	*146,856*	*99,436*	*74,258*	*104,100*	*104,100*	-	*0.0%*
Rents/Royalties/Concessions:							
-Parks & Recreation - Rentals	24,263	17,310	10,292	19,750	19,750	-	0.0%
-Other Rentals	803	8,581	10,100	8,600	8,600	-	0.0%
Subtotal - Rents/Royalties	*25,066*	*25,890*	*20,392*	*28,350*	*28,350*	-	*0.0%*
Miscellaneous Revenues:							
-Sales Revenue	72,308	85,808	10,478	1,000,000	-	(1,000,000)	-100.0%
-Other Misc. Revenue	(1,821,191)	(578,593)	(3,764,505)	128,558	3,441,949	3,313,391	2577.4%
Subtotal - Miscellaneous	*(1,748,883)*	*(492,785)*	*(3,754,027)*	*1,128,558*	*3,441,949*	*2,313,391*	*205.0%*
Intergovernmental Grants:							
-State Grants	-	-	-	-	50,000	50,000	N/A
Subtotal - Intergovernmental	-	-	-	-	*50,000*	*50,000*	*N/A*
Interest on Investments	1,517,465	697,729	3,474,654	3,134,105	2,770,799	(363,306)	-11.6%
Transfers In	3,104,936	3,545,419	5,831,753	14,394,600	19,616,240	5,221,640	36.3%
TOTAL REVENUES	**134,149,549**	**143,836,957**	**153,154,069**	**161,051,606**	**176,700,681**	**15,649,075**	**9.7%**

PROPOSED FISCAL YEAR 2027 BUDGET

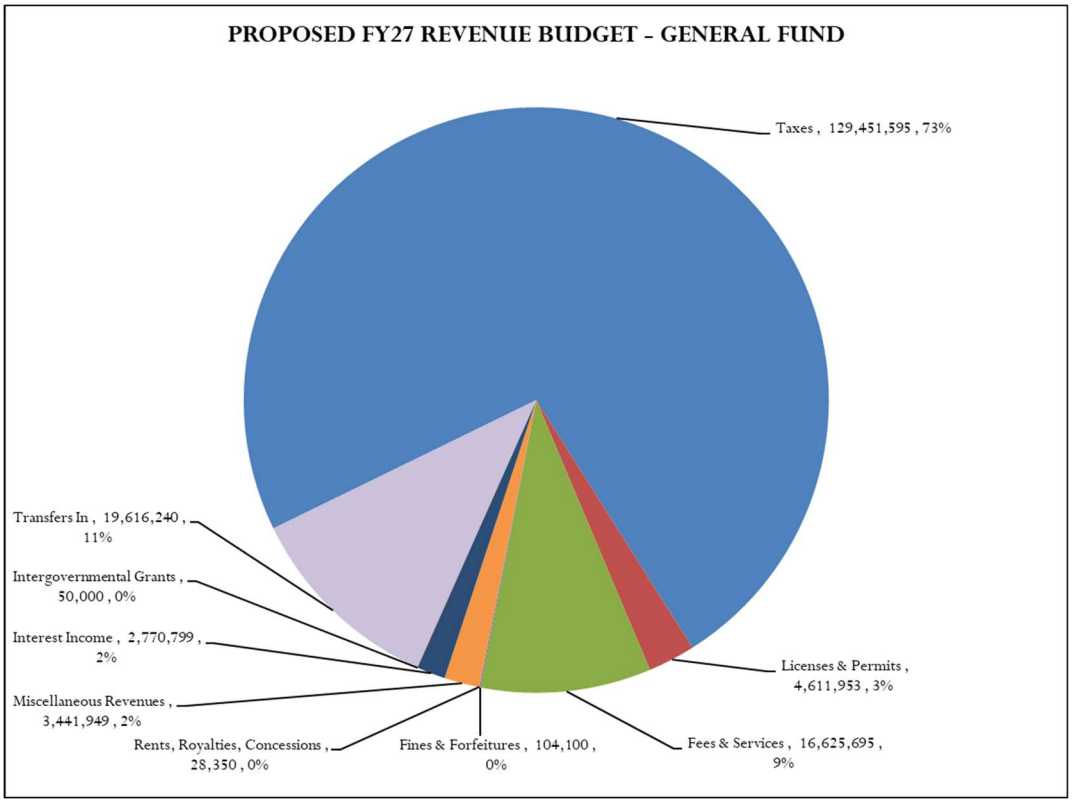
CITY OF SANTA FE

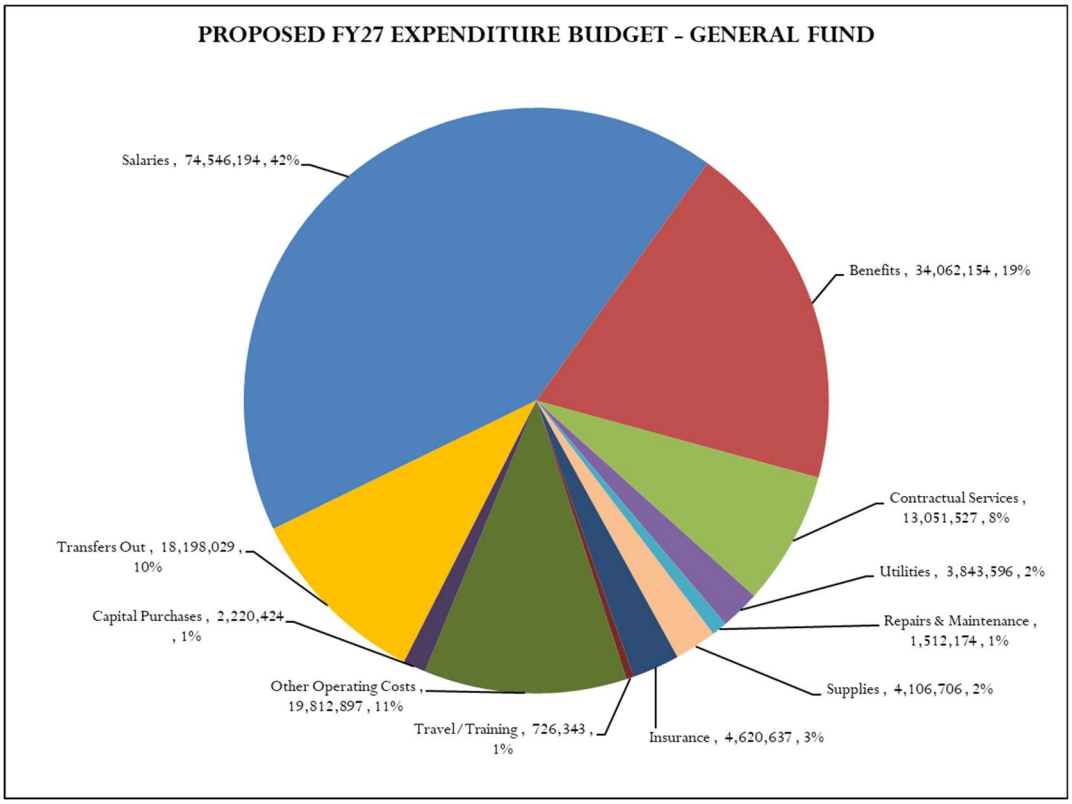
GENERAL FUND - EXPENDITURES BY CATEGORY

FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Personnel Services:							
-Salaries	53,481,064	57,605,727	63,694,974	68,557,010	74,546,194	5,989,184	8.7%
-Benefits	25,151,714	27,733,949	30,783,006	32,351,761	34,062,154	1,710,393	5.3%
Subtotal - Personnel Services	*78,632,778*	*85,339,676*	*94,477,981*	*100,908,771*	*108,608,348*	*7,699,577*	*7.6%*
Operating Expenses:							
-Contractual Services	8,683,766	10,093,712	10,488,005	11,666,496	13,051,527	1,385,031	11.9%
-Utilities	3,878,621	4,221,509	3,648,325	4,187,596	3,843,596	(344,000)	-8.2%
-Repairs & Maintenance	1,370,827	994,212	645,664	1,186,829	1,512,174	325,345	27.4%
-Supplies	3,400,538	3,818,559	3,973,239	3,865,042	4,106,706	241,664	6.3%
-Insurance	1,780,229	4,616,911	5,015,002	5,133,798	4,620,637	(513,161)	-10.0%
-Travel/Training	357,977	422,239	544,980	618,455	726,343	107,888	17.4%
-Other Operating Costs	9,329,024	13,632,507	15,296,978	12,674,557	19,812,897	7,138,340	56.3%
Subtotal - Operating Expenses	*28,800,982*	*37,799,649*	*39,612,193*	*39,332,773*	*47,673,880*	*8,341,107*	*21.2%*
Capital Outlay:							
-Capital Purchases	17,164	4,558,722	4,181,080	1,522,201	2,000,424	478,223	31.4%
-Land & Building	228,659	129,987	435,974	220,000	220,000	-	0.0%
Subtotal - Capital Outlay	*245,823*	*4,688,709*	*4,617,054*	*1,742,201*	*2,220,424*	*478,223*	*27.4%*
Transfers Out	11,627,855	12,741,913	35,253,226	19,067,861	18,198,029	(869,832)	-4.6%
TOTAL EXPENDITURES	**119,307,438**	**140,569,947**	**173,960,454**	**161,051,606**	**176,700,681**	**15,649,075**	**9.7%**

PROPOSED FISCAL YEAR 2027 BUDGET





PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
GENERAL FUND EXPENDITURES BY DEPARTMENT
FY 2022/23 THROUGH FY 2026/27

DEPARTMENT	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Community Engagement	2,400,406	2,644,069	2,716,823	3,227,614	3,645,850	418,236	13.0%
Community Services	11,755,168	13,786,916	20,925,797	19,876,868	19,400,417	(476,451)	-2.4%
Economic Development	2,295,710	2,796,895	4,512,871	2,848,991	3,123,868	274,877	9.6%
Emergency Management	167,156	189,176	310,322	335,924	717,812	381,888	113.7%
Finance	6,959,811	8,776,466	8,695,902	8,751,208	8,825,022	73,814	0.8%
Fire	25,216,546	29,437,443	36,961,250	34,740,216	39,040,901	4,300,685	12.4%
General Government	5,557,789	6,696,573	7,273,455	8,173,823	9,640,867	1,467,044	17.9%
Human Resources	6,432,314	4,087,127	2,513,524	2,595,897	3,024,788	428,891	16.5%
Info. Tech. & Telecomm.	-	-	2,487,000	-	-	-	N/A
Planning & Land Use	9,943,714	8,366,438	12,717,660	12,105,390	13,934,072	1,828,682	15.1%
Police	26,759,108	34,491,909	36,470,397	36,813,085	40,028,902	3,215,817	8.7%
Public Works	20,562,355	28,985,909	37,040,272	30,230,696	34,019,021	3,788,325	12.5%
Non-Departmental	*1,257,362*	*311,026*	*1,335,179*	*1,351,894*	*1,299,161*	(52,733)	-3.9%
TOTAL GENERAL FUND	**119,307,438**	**140,569,947**	**173,960,454**	**161,051,606**	**176,700,681**	**15,649,075**	**9.7%**

PROPOSED FISCAL YEAR 2027 BUDGET

FY27 Proposed Budget - Position Count

Department Name	FY26 Original FTE	FY26 Current FTE	FY27 Proposed FTE	FY27 - # of Vacant Positions	Vacancy Rate Starting FY27	Notes - Changes from FY26 to FY27 (transfers, new positions, etc.)
Community Engagement	**21.0**	**21.0**	**23.0**	**3.0**	**13%**	**FY26 - 1 New FTE:** (Constituent Services) 1 Paralegal; **FY26 - 1 FTE Transferred and Reclassed:** 1 Communications Director moved from Constituent Services to General Government/City Manager; **FY27 - 2 New FTE:** (Constituent Services) 1 Translator, 1 Broadcast & Streaming Production Specialist
City Clerk	8.0	9.0	9.0	1	11%	
Constituent Services	13.0	12.0	14.0	2	14%	
Community Services	**196.5**	**202.5**	**202.5**	**33**	**16%**	**FY26 - 5 New FTE:** (Recreation) 2 Recreation Supervisors, (Youth & Family) 2 Program Managers, 1 Data Reporting & Policy Development Manager; **FY26 - 1 FTE Unfrozen:** (Recreation) 1 Recreation Supervisor, 1 Youth Program Coordinator; **FY26 - 1 FTE Frozen:** (Senior Services) 1 Transit Driver III; **FY26 - 1 FTE Transferred:** 1 Contracts Administrator moved from Library to Community Services Admin.
Community Services Admin.	6.5	7.5	7.5	2	27%	
Library	46.5	45.5	45.5	2	4%	
Recreation	82.0	86.0	86.0	22	26%	
Senior Services	53.5	52.5	52.5	5	10%	
Youth & Family	8.0	11.0	11.0	2	18%	
Economic Development	**18.0**	**21.0**	**22.0**	**5**	**23%**	**FY26 - 1 New FTE:** (Arts and Culture) 1 Administrative Manager; **FY26 - 2 New FTE:** (Economic Development) 2 term Economic Development Specialist; **FY27 - 2 New FTE:** (Economic Development) 2 Project Manager; **FY27 - 1 FTE Frozen:** (Economic Development) 1 Community Development Director
Arts and Culture	5.0	6.0	6.0	1	17%	
Economic Development	11.0	13.0	14.0	4	29%	
Santa Fe Film	2.0	2.0	2.0	0	0%	
Emergency Management	**2.0**	**2.0**	**2.0**	**1**	**50%**	
Finance	**56.4**	**58.4**	**58.4**	**14.0**	**24%**	**FY26 - 2 New FTE:** (Budget) 1 Budget Analyst, (Finance Admin.) 1 Project Administrator
Finance Admin.	5.0	6.0	6.0	2	33%	
Accounting	18.4	18.4	18.4	6	33%	
Budget	4.0	5.0	5.0	2	40%	
Fleet Management	13.0	13.0	13.0	2	15%	
Purchasing	6.0	6.0	6.0	1	17%	
Treasurer	10.0	10.0	10.0	1	10%	
Fire	**211.0**	**210.0**	**210.0**	**16**	**8%**	**FY26 - 3 New FTE:** (Fire Admin.) 1 Project Specialist, 1 Business Operations Manager, 1 Fiscal Administrator; **FY26 - 3 FTE Unfrozen:** (Fire Admin.) 1 Administrative Assistant, (Fire Operations) 1 Forestry Tech, (Fire Support Svcs.) 1 Fire Apparatus Tech I; **FY26 - 2 FTE Transferred:** 1 Wildlife Urban Interface Specialist, 1 Fire Training Captain moved from Fire Operations to Support Svcs.
Fire Admin.	6.0	10.0	10.0	2	20%	
Fire Operations	168.0	167.0	167.0	10	6%	
Fire Support Services	37.0	33.0	33.0	4	12%	
General Government	**61.3**	**63.3**	**62.3**	**9**	**14%**	**FY26 - 4 New FTE:** (City Attorney) 1 term Paralegal Basic, 1 Legislation Coordinator, 1 Legislative Administrator, (Risk Mgmt.) 1 Risk & Safety Compliance Officer; **FY26 - 1 FTE Frozen:** (City Council) 1 Council Liaison, (Municipal Court) 1 Court Clerk; **FY27 - 1 FTE Transferred:** 1 Public Records Specialist moved from City Attorney to Police Admin.
Mayor	3.0	3.0	3.0	1	33%	
City Council	9.0	8.0	8.0	0	0%	
City Manager	5.3	5.3	5.3	1	19%	
City Attorney	20.0	23.0	22.0	6	27%	
Municipal Court	19.0	18.0	18.0	1	6%	
Risk Management & Safety	5.0	6.0	6.0	3	50%	
	5.0	3.0	3.0	1	33%	Safety was transferred from Community Development to General Government. Emergency Management is now separate from Safety
Human Resources	**18.0**	**17.0**	**18.0**	**2**	**11%**	**FY26 - 1 FTE Frozen:** Administrative Manager (temp); **FY27 - 1 New FTE:** 1 HR Information Systems Manager

[continued next page]

PROPOSED FISCAL YEAR 2027 BUDGET

FY27 Proposed Budget - Position Count

Department Name	FY26 Original FTE	FY26 Current FTE	FY27 Proposed FTE	# of FY26 frozen (vacant/unfunded positions) proposed to be filled in FY27	Cost of FY26 frozen (vacant/unfunded positions) proposed to be filled in FY27	FY27 - # of Vacant Positions	Vacancy Rate Starting FY27	Notes - Changes from FY26 to FY27 (transfers, new positions, etc.)
[continued from previous page]								
Info. Tech. & Telecomm.	**44.9**	**44.9**	**44.9**	**0.0**	**0.0**	**8**	**18%**	
ITT Admin.	5.0	5.0	5.0			1	20%	
ITT End User Services	9.0	9.0	9.0			1	11%	
Enterprise Application Services	7.0	7.0	7.0			4	57%	
Enterprise Resource Planning	12.9	12.9	12.9			1	8%	
Infrastructure Services	11.0	11.0	11.0			1	9%	
ITT Security & Compliance	0.0	0.0	0.0			0	0%	
Planning & Land Use	**70.0**	**70.0**	**70.0**			**14**	**168%**	**FY26 - 1 New FTE:** (Affordable Housing) 1 Project Manager; **FY26 - 3 FTE Unfrozen:** (Planning & Land Use) 1 Construction Inspector & 1 Construction Plans Examiner III unfrozen but not funded - will reflect as frozen unfunded in FY27; 1 Contracts Administrator; **FY27 - 2 New FTE:** (Affordable Housing) 2 Project Manager; **FY27 - 1 FTE Unfrozen:** (Planning & Land Use) 1 Engineer; **FY27- 2 FTE Frozen:** (Planning & Land Use) 1 Construction Inspector, 1 Construction Plans Examiner III
Land Use Admin.	8.0	7.0	7.0	0.0	0.0	1	14%	
Affordable Housing	5.0	5.0	7.0	0.0	0.0	4	57%	
Building Permit Div	11.0	11.0	10.0			4	40%	
Enforcemnt Division	0.0	8.0	8.0			0	0%	
Historic Preservation	5.0	5.0	5.0			1	20%	
Inspections Division	23.0	17.0	16.0			2	13%	
Planning Division	11.0	10.0	10.0			1	10%	
Technical Review Div	7.0	7.0	7.0	0.0	0.0	1	14%	
Metropolitan Redevelopment Agency	**2.0**	**4.0**	**3.0**			**2**	67%	**FY26 - 2 New FTE:** 1 Administrative Manager, 1 Project Manager
Police	**237.0**	**240.0**	**242.0**	**0.0**	**0.0**	**16.0**	**7%**	**FY26 - 5 New FTE:** (Police Admin.) 4 Project Specialist, 1 Police Records Supervisor; **FY26 - 2 FTE Unfrozen:** (Police Admin.) 1 Administrative Manager, 1 Public Safety Aide; **FY26 - 3 FTE Frozen:** (Police Admin.) 2 Records Tech, 1 Admin. Manager; **FY27 - 1 FTE Transferred:** 1 Public Records Specialist moved from City Attorney to Police Admin.; **FY27 - 1 New FTE:** PIO/IPRA (position title TBD)
Police Admin.	51.0	54.0	56.0			6	11%	
Police Operations	186.0	186.0	186.0			10	5%	
Public Utilities	**261.7**	**256.7**	**259.7**	**0.0**	**0.0**	**47**	**18%**	**FY26 - 2 New FTE:** (UCS) 1 Utility Billing Division Director - retirement double fill (expires 7/1/27), (Water) 1 T&D Manager - retirement double fill (expired 10/29/25, not included in FY27); **FY26 - 1 FTE Transferred:** 1 Contracts Admin. moved from Buckman Direct Diversion to Utility Customer Service; **FY26 - 5 FTE Frozen:** (Water) unknown positions due to reclassifications and transfers between funds; **FY27 - Created New Division:** (Conservation & Sustainability) 10 total FTEs - transferred 6 FTE from Environmental Svcs., 2 FTE from Wastewater and 2 FTE from Water
Public Utilities Admin.	11.0	11.0	11.0			3	27%	
Conservation & Sustainability	0.0	0.0	10.0			4	40%	
Environmental Services	73.0	73.0	67.0			2	3%	
Utility Customer Service	29.7	31.7	31.7			6	19%	
Wastewater	68.3	66.3	64.3			20	31%	
Water	79.7	74.7	75.7			12	16%	
Public Works	**348.7**	**333.7**	**340.7**	**0.0**	**0.0**	**77**	**23%**	**FY26 - 1 FTE Unfrozen:** (Facilities) 1 Maintenance Specialist; **FY26 - 1 FTE Frozen:** (Facilities) 1 Custodian; **FY27 - 7 New FTE:** (Parks) 1 Superintendent, 1 Parks Maintenance Worker Senior, 5 Parks Maintenance Worker
Public Works Admin.	5.5	5.0	5.0			1	20%	
Facilities	56.0	55.0	55.0			8	15%	
Metropolitan Planning Organization	3.0	3.0	3.0			0	0%	
Municipal Recreation Complex	10.0	10.0	10.0			0	0%	
Parking	29.0	29.0	29.0			5	17%	
Parks Division	70.0	71.0	78.0			15	19%	
Complete Streets Division	59.7	53.7	53.7			12	22%	
Transit	115.5	107.0	107.0			36	34%	
Regional Airport	**32.0**	**37.0**	**37.0**			**7**	**19%**	**FY26 - 5 New FTE:** 3 Airport Shuttle Driver, 1 Custodian, 1 Airport Operations Officer
Tourism Santa Fe	**48.0**	**48.0**	**49.0**			**4**	**8%**	**FY26 - 1 New FTE Transferred:** 1 Parks Ranger Supervisor; moved from Visit Santa Fe to Convention Center; **FY27 - 1 New FTE:** 1 Assistant Operations Manager
Santa Fe Civic Center	23.0	24.0	24.0			1	4%	-
Visitors Bureau	25.0	24.0	25.0			3	12%	
Total	**1,628.5**	**1,629.5**	**1,644.5**	**-**	**-**	**257**	**16%**	**FY26:** 29 New FTE, 10 Unfrozen FTE, 11 Frozen FTE; **FY27:** 14 New FTE, 3 Frozen FTE, 1 Unfrozen FTE

NOTE: some position counts are not whole numbers due to split-funded positions

CITY OF SANTA FE
COMMUNITY ENGAGEMENT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
City Clerk	1,307,582	1,235,156	2,219,430	1,710,894	(508,536)	-22.9%
Constituent Services	1,488,487	1,481,667	1,608,184	1,934,956	326,772	20.3%
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	1,640,182	1,721,159	2,235,713	2,506,242	270,529	12.1%
Contractuals & Utilities	312,521	430,383	432,965	410,567	(22,398)	-5.2%
Repairs & Maintenance	3,813	5,520	5,000	5,000	-	0.0%
Supplies	175,563	123,787	162,296	200,975	38,679	23.8%
Insurance	66,885	75,781	71,078	71,624	546	0.8%
Other Operating Costs	424,452	295,742	920,562	451,442	(469,120)	-51.0%
Capital Purchases	110,651	64,451	-	-	-	N/A
Transfers to Other Funds	62,000	-	-	-	-	N/A
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	2,644,069	2,716,823	3,227,614	3,645,850	418,236	13.0%
Franchise Fee Fund	62,000	-	-	-	-	N/A
Public Campaign Financing	90,000	-	600,000	-	(600,000)	-100.0%
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

CITY OF SANTA FE
COMMUNITY SERVICES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Community Services Administration	1,493,950	5,425,765	1,468,544	3,185,110	1,716,566	116.9%
Library	5,588,268	6,786,644	6,361,349	6,902,735	541,386	8.5%
Recreation	12,294,268	11,222,185	13,172,769	14,810,522	1,637,753	12.4%
Senior Services	6,615,371	8,613,160	9,353,907	10,127,452	773,545	8.3%
Youth & Family	7,848,588	10,598,643	9,951,577	7,848,530	(2,103,047)	-21.1%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	12,457,056	13,674,037	16,980,050	17,900,457	920,407	5.4%
Contractuals & Utilities	8,798,076	8,384,297	7,930,929	9,982,571	2,051,642	25.9%
Repairs & Maintenance	216,476	289,029	179,932	425,700	245,768	136.6%
Supplies	2,001,022	2,132,671	1,994,650	2,066,353	71,703	3.6%
Insurance	878,434	805,411	739,169	770,656	31,487	4.3%
Other Operating Costs	2,786,308	3,811,341	2,354,510	3,654,389	1,299,879	55.2%
Capital Purchases	624,376	1,443,043	167,011	348,656	181,645	108.8%
Transfers to Other Funds	6,078,697	12,106,569	9,961,895	7,725,567	(2,236,328)	-22.4%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	13,786,916	20,925,797	19,876,868	19,400,417	(476,451)	-2.4%
Law Enforcement	58,616	91,041	316,342	678,822	362,480	114.6%
Community Development	5,915,160	5,229,866	4,092,117	5,676,631	1,584,514	38.7%
Senior Citizen Grants/Programs	4,207,798	5,091,240	5,104,743	5,361,295	256,552	5.0%
Library	1,158,908	1,488,703	1,203,977	1,272,366	68,389	5.7%
Quality of Life	54,998	128,495	163,770	163,770	-	0.0%
Recreation Programs	3,350,247	3,960,010	4,683,100	4,860,884	177,784	3.8%
Special Recreation Leagues	4,548	2,846	5,800	5,800	-	0.0%
Genoveva Chavez Community Ctr.	5,303,254	5,728,400	4,861,429	5,454,364	592,935	12.2%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

CITY OF SANTA FE
DEPARTMENT OF ECONOMIC DEVELOPMENT & CREATIVE INDUSTRIES - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Arts & Culture	1,575,668	2,846,099	2,117,640	2,630,720	513,080	24.2%
Economic Development	5,993,515	8,121,528	5,361,592	5,792,366	430,774	8.0%
Santa Fe Film Office	-	568,978	504,955	529,495	24,540	4.9%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	1,670,299	1,853,561	2,482,896	2,691,734	208,838	8.4%
Contractuals & Utilities	2,648,404	3,370,622	1,477,204	1,617,187	139,983	9.5%
Repairs & Maintenance	1,569	8,261	4,000	3,700	(300)	-7.5%
Supplies	54,752	100,018	98,850	148,005	49,155	49.7%
Insurance	56,239	55,893	72,688	72,861	173	0.2%
Other Operating Costs	1,210,973	1,847,702	1,840,361	2,212,815	372,454	20.2%
Capital Purchases	-	85,773	-	-	-	N/A
Debt Service	-	5,000	-	-	-	N/A
Transfers to Other Funds	1,926,948	4,209,774	2,008,188	2,206,279	198,091	9.9%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	2,796,895	4,512,871	2,848,991	3,123,868	274,877	9.6%
Economic Development	2,551,568	2,844,857	2,412,107	2,547,412	135,305	5.6%
Lodgers' Tax Fund	1,534,296	2,713,181	1,990,938	2,486,998	496,060	24.9%
Community Development	645,052	763,800	100,494	121,086	20,592	20.5%
Santa Fe Film Office	-	568,978	504,955	529,495	24,540	4.9%
Santa Fe Convention Center	41,372	132,918	126,702	143,722	17,020	13.4%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

CITY OF SANTA FE
EMERGENCY MANAGEMENT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	229,189	293,242	273,538	323,881	50,343	18.4%
Contractuals & Utilities	98,352	7,892	243,021	16,495	(226,526)	-93.2%
Repairs & Maintenance	-	-	250	-	(250)	-100.0%
Supplies	103,340	37,425	217,351	246,601	29,250	13.5%
Insurance	7,327	8,071	6,604	9,183	2,579	39.1%
Other Operating Costs	75,253	119,907	131,176	431,142	299,966	228.7%
Capital Purchases	28,845	94,414	76,158	76,158	-	0.0%
TOTAL EMERGENCY MANAGEMENT	**542,307**	**560,952**	**948,098**	**1,103,460**	**155,362**	**16.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	189,176	310,322	335,924	717,812	381,888	113.7%
Emergency Services (grant funding)	258,037	227,958	612,174	385,648	(226,526)	-37.0%
Community Development	95,094	22,671	-	-	-	N/A
TOTAL EMERGENCY MANAGEMENT	**542,307**	**560,952**	**948,098**	**1,103,460**	**155,362**	**16.4%**

CITY OF SANTA FE
FINANCE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Finance Administration	1,278,975	1,312,151	1,601,441	1,893,305	291,864	18.2%
Accounting	5,383,862	3,706,177	3,097,808	2,903,443	(194,365)	-6.3%
Budget	18,200,890	23,404,980	16,387,733	12,631,062	(3,756,671)	-22.9%
Fleet Management	1,529,059	1,857,475	1,758,213	1,985,056	226,843	12.9%
Purchasing	1,639,225	963,654	1,031,152	1,203,888	172,736	16.8%
Treasury	1,084,953	1,444,078	2,450,138	2,205,845	(244,293)	-10.0%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,822,599**	**(3,503,886)**	**-13.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	4,840,314	5,962,505	6,960,781	7,009,061	48,280	0.7%
Contractuals & Utilities	4,107,679	2,109,544	2,482,700	2,015,000	(467,700)	-18.8%
Repairs & Maintenance	163,798	114,281	250,000	293,000	43,000	17.2%
Supplies	550,829	345,951	574,200	724,400	150,200	26.2%
Insurance	153,994	221,950	197,212	199,681	2,469	1.3%
Other Operating Costs	763,676	729,972	574,603	892,715	318,112	55.4%
Capital Purchases	12,292	85,914	20,000	50,000	30,000	150.0%
Transfers to Other Funds	18,524,383	23,118,399	15,266,989	11,638,742	(3,628,247)	-23.8%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,822,599**	**(3,503,886)**	**-13.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	8,776,466	8,695,902	8,751,208	8,825,022	73,814	0.8%
Capital Equipment Reserve	803,570	52,751	-	-	-	N/A
Lodgers' Tax Fund	93,455	137,562	352,734	177,122	(175,612)	-49.8%
Community Development	-	278	-	-	-	N/A
1/2% GRT Income Fund	17,914,415	22,244,547	15,464,330	11,835,399	(3,628,931)	-23.5%
Services to Other Depts	1,529,059	1,557,475	1,758,213	1,985,056	226,843	12.9%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,822,599**	**(3,503,886)**	**-13.3%**

CITY OF SANTA FE
FIRE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Fire Administration	4,003,767	5,932,596	3,483,855	6,272,055	2,788,200	80.0%
Fire Operations	20,593,763	25,840,021	25,541,866	27,060,515	1,518,649	5.9%
Support Services	6,226,012	7,637,289	6,877,668	7,630,786	753,118	11.0%
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	25,028,156	28,364,702	29,464,690	30,419,854	955,164	3.2%
Contractuals & Utilities	524,845	539,487	768,885	2,298,318	1,529,433	198.9%
Repairs & Maintenance	140,854	189,036	127,674	154,284	26,610	20.8%
Supplies	1,812,582	1,887,770	1,655,951	2,314,995	659,044	39.8%
Insurance	710,451	876,512	776,875	762,956	(13,919)	-1.8%
Other Operating Costs	1,292,611	3,360,884	2,116,782	3,912,880	1,796,098	84.9%
Capital Purchases	1,101,042	2,753,511	992,532	1,100,069	107,537	10.8%
Debt Service	89,839	214,844	-	-	-	N/A
Transfers to Other Funds	123,163	1,223,161	-	-	-	N/A
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	29,437,443	36,961,250	34,740,216	39,040,901	4,300,685	12.4%
Emergency Services	1,386,100	1,348,656	1,163,173	1,922,455	759,282	65.3%
Impact Fees Fund	-	1,100,000	-	-	-	N/A
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

CITY OF SANTA FE
GENERAL GOVERNMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Mayor's Office	668,199	406,883	667,169	733,795	66,626	10.0%
City Council	521,385	652,878	747,867	949,548	201,681	27.0%
City Manager	701,546	916,077	1,144,336	1,583,280	438,944	38.4%
City Attorney	2,939,449	3,207,144	3,147,697	3,692,722	545,025	17.3%
Internal Audit	837	173,975	150,000	200,000	50,000	33.3%
Municipal Court	1,964,734	1,934,989	2,377,354	2,518,122	140,768	5.9%
Risk Management	7,196,538	7,395,374	8,684,414	10,248,623	1,564,209	18.0%
Safety	1,949,324	1,991,533	4,298,918	4,541,887	242,969	5.7%
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,502,506	5,644,444	6,556,468	7,207,126	650,658	9.9%
Contractuals & Utilities	1,042,516	1,186,638	1,270,827	2,235,800	964,973	75.9%
Repairs & Maintenance	4,415	12,503	6,775	7,944	1,169	17.3%
Supplies	213,169	231,612	422,928	417,422	(5,506)	-1.3%
Insurance	8,118,866	8,731,916	11,642,810	13,010,307	1,367,497	11.7%
Other Operating Costs	974,726	869,618	1,186,947	1,539,378	352,431	29.7%
Capital Purchases	23,315	-	131,000	50,000	(81,000)	-61.8%
Transfers to Other Funds	62,500	2,120	-	-	-	N/A
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	6,696,573	7,273,455	8,173,823	9,640,867	1,467,044	17.9%
Law Enforcement	99,577	18,490	60,600	36,600	(24,000)	-39.6%
Risk Management	7,784,261	7,948,567	9,514,876	11,319,574	1,804,698	19.0%
Workers' Compensation	1,361,601	1,438,340	3,468,456	3,470,936	2,480	0.1%
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

CITY OF SANTA FE
HUMAN RESOURCES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	3,505,379	2,002,176	2,042,177	2,323,886	281,709	13.8%
Contractuals & Utilities	1,369,172	1,232,782	1,442,277	1,613,541	171,264	11.9%
Repairs & Maintenance	-	67	-	-	-	N/A
Supplies	32,950	60,643	115,320	115,320	-	0.0%
Insurance	22,670,557	24,089,218	28,297,999	29,155,109	857,110	3.0%
Other Operating Costs	347,409	324,764	377,220	479,502	102,282	27.1%
Capital Purchases	-	199	-	-	-	N/A
Transfers to Other Funds	75,000	235,405	75,000	96,824	21,824	29.1%
TOTAL HUMAN RESOURCES	**28,000,468**	**27,945,254**	**32,349,993**	**33,784,182**	**1,434,189**	**4.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	4,087,127	2,513,524	2,595,897	3,024,788	428,891	16.5%
Santa Fe Health/Dental	23,834,738	25,398,056	29,678,552	30,683,850	1,005,298	3.4%
Unemployment Claims	78,602	33,673	75,544	75,544	-	0.0%
TOTAL HUMAN RESOURCES	**28,000,468**	**27,945,254**	**32,349,993**	**33,784,182**	**1,434,189**	**4.4%**

CITY OF SANTA FE
INFORMATION TECHNOLOGY & TELECOMMUNICATIONS - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
ITT Administration	5,208,743	4,644,452	2,466,666	2,495,776	29,110	1.2%
End User Services	870,468	810,534	995,253	1,044,346	49,093	4.9%
Enterprise Application Services	2,254,979	4,904,828	2,752,479	4,962,145	2,209,666	80.3%
Enterprise Project Management	2,305,733	1,258,462	1,688,210	1,707,069	18,859	1.1%
Infrastructure Services	4,866,317	7,123,386	7,116,949	13,636,350	6,519,401	91.6%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,845,686**	**8,826,129**	**58.8%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,337,269	4,754,749	5,754,695	5,852,899	98,204	1.7%
Contractuals & Utilities	1,983,543	2,361,975	2,395,326	7,328,825	4,933,499	206.0%
Repairs & Maintenance	97,865	207,374	171,000	57,032	(113,968)	-66.6%
Supplies	1,246,244	2,312,322	1,943,221	4,380,579	2,437,358	125.4%
Insurance	97,986	199,165	154,947	156,839	1,892	1.2%
Other Operating Costs	3,061,424	5,398,800	2,744,100	4,099,082	1,354,982	49.4%
Capital Purchases	427,312	382,894	498,715	1,088,715	590,000	118.3%
Debt Service	4,596	14,970	-	-	-	N/A
Transfers to Other Funds	3,250,000	3,109,412	1,357,553	881,715	(475,838)	-35.1%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,845,686**	**8,826,129**	**58.8%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	-	2,487,000	-	-	-	N/A
1/2% GRT Income Fund	3,652,744	500,000	1,598,753	1,549,715	(49,038)	-3.1%
Services to Other Depts	11,853,495	15,754,662	13,420,804	22,295,971	8,875,167	66.1%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,845,686**	**8,826,129**	**58.8%**

CITY OF SANTA FE
METROPOLITAN REDEVELOPMENT AGENCY - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	95,505	280,848	304,396	404,921	100,525	33.0%
Contractuals & Utilities	-	257,769	271,326	202,218	(69,108)	-25.5%
Supplies	2,755	3,966	2,500	6,500	4,000	160.0%
Insurance	-	-	-	13,213	13,213	N/A
Other Operating Costs	578	25	16,333	47,995	31,662	193.9%
Capital Purchases	-	29,040	-	-	-	N/A
TOTAL METRO. REDEV. AGENCY	**98,838**	**571,648**	**594,555**	**674,847**	**80,292**	**13.5%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Economic Development	98,838	571,648	594,555	674,847	80,292	13.5%
TOTAL METRO. REDEV. AGENCY	**98,838**	**571,648**	**594,555**	**674,847**	**80,292**	**13.5%**

CITY OF SANTA FE
PLANNING & LAND USE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Land Use Administration	2,367,400	3,071,174	2,795,125	3,572,244	777,119	27.8%
Affordable Housing	7,395,395	9,602,417	8,623,080	8,922,060	298,980	3.5%
Building Permit Division	761,270	748,602	918,364	969,734	51,370	5.6%
Enforcement Division	-	230,175	11,120	786,524	775,404	6973.1%
Historic Preservation	512,549	562,682	596,405	615,488	19,083	3.2%
Inspections Division	1,887,809	1,990,066	2,191,763	1,815,092	(376,671)	-17.2%
Planning Division	789,780	1,058,819	1,106,288	1,164,812	58,524	5.3%
Technical Review	514,484	672,511	734,037	910,327	176,290	24.0%
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,756,281**	**1,780,099**	**10.5%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,760,345	6,249,650	6,939,025	8,029,070	1,090,045	15.7%
Contractuals & Utilities	5,890,619	6,811,529	5,721,590	6,078,885	357,295	6.2%
Repairs & Maintenance	-	-	2,549	2,549	-	0.0%
Supplies	76,864	61,622	108,670	79,770	(28,900)	-26.6%
Insurance	231,348	272,503	252,181	253,848	1,667	0.7%
Other Operating Costs	852,821	706,074	717,167	1,077,159	359,992	50.2%
Capital Purchases	723,854	81,525	235,000	235,000	-	0.0%
Transfers to Other Funds	692,837	3,753,544	3,000,000	3,000,000	-	0.0%
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,756,281**	**1,780,099**	**10.5%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	8,366,438	12,717,660	12,105,390	13,934,072	1,828,682	15.1%
Impact Fees Fund	52,555	73,382	89,689	96,676	6,987	7.8%
Community Development	5,796,083	5,145,153	4,781,103	165,533	(4,615,570)	-96.5%
Affordable Housing Trust	-	-	-	4,560,000	4,560,000	N/A
Historic Preservation	13,650	-	-	-	-	N/A
Land Development	(38)	251	-	-	-	N/A
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,756,281**	**1,780,099**	**10.5%**

CITY OF SANTA FE
POLICE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Police Administration	16,998,485	16,018,403	16,292,637	20,641,585	4,348,948	26.7%
Police Operations	22,776,915	25,620,798	25,820,842	27,190,083	1,369,241	5.3%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	25,612,137	28,966,505	29,652,902	31,900,978	2,248,076	7.6%
Contractuals & Utilities	963,171	1,352,584	1,652,589	2,341,377	688,788	41.7%
Repairs & Maintenance	136,043	185,789	199,571	211,652	12,081	6.1%
Supplies	948,770	992,809	1,048,408	1,169,339	120,931	11.5%
Insurance	1,166,076	1,528,482	1,804,304	1,871,425	67,121	3.7%
Other Operating Costs	6,220,180	5,192,392	6,232,342	8,208,202	1,975,860	31.7%
Capital Purchases	4,729,022	3,420,641	1,523,363	2,128,695	605,332	39.7%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	34,491,909	36,470,397	36,813,085	40,028,902	3,215,817	8.7%
Animal Services	64,883	1,001	4,705	5,000	295	6.3%
Law Enforcement	5,218,608	5,167,803	5,295,689	7,797,766	2,502,077	47.2%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

CITY OF SANTA FE
PUBLIC UTILITIES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Public Utilities Administration	3,439,284	2,186,009	4,093,704	3,603,083	(490,621)	-12.0%
Conservation & Sustainability	1,683,306	2,996,761	1,863,966	2,461,222	597,256	32.0%
Environmental Services	16,374,733	16,404,095	24,796,557	25,088,574	292,017	1.2%
Utility Customer Service	5,209,828	5,570,280	9,386,993	8,499,202	(887,791)	-9.5%
Wastewater Management	15,020,899	19,010,286	22,709,242	19,143,241	(3,566,001)	-15.7%
Water Operations	33,072,862	28,764,046	37,866,802	41,668,518	3,801,716	10.0%
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,463,840**	**(253,424)**	**-0.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	18,419,827	20,857,558	25,224,532	27,312,171	2,087,639	8.3%
Contractuals & Utilities	11,803,762	14,713,448	21,043,173	23,094,615	2,051,442	9.7%
Repairs & Maintenance	3,275,335	4,440,282	5,502,600	2,751,197	(2,751,403)	-50.0%
Supplies	2,494,884	2,702,179	4,476,977	4,279,597	(197,380)	-4.4%
Insurance	1,915,740	1,321,683	1,387,124	2,110,781	723,657	52.2%
Other Operating Costs	26,688,716	19,094,961	19,075,526	18,304,237	(771,289)	-4.0%
Capital Purchases	(16,076)	1,747,318	4,996,700	4,517,500	(479,200)	-9.6%
Debt Service	2,541,386	2,533,711	5,584,253	5,607,942	23,689	0.4%
Transfers to Other Funds	7,677,338	7,520,336	13,426,379	12,485,800	(940,579)	-7.0%
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,463,840**	**(253,424)**	**-0.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Resource Conservation	957,664	1,028,544	1,576,663	1,074,797	(501,866)	-31.8%
Community Development	21,411	10,132	-	-	-	N/A
Waste Water Management	15,020,899	19,010,286	22,709,242	19,143,241	(3,566,001)	-15.7%
Water Management	34,734,757	31,750,675	39,730,768	41,668,518	1,937,750	4.9%
Environmental Services	16,369,733	16,404,095	24,271,157	25,088,574	817,417	3.4%
Utilities Administration	7,696,448	6,727,744	12,429,434	11,027,488	(1,401,946)	-11.3%
Conservation & Sustainability	-	-	-	2,461,222	2,461,222	N/A
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,463,840**	**(253,424)**	**-0.3%**

CITY OF SANTA FE
PUBLIC WORKS DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Public Works Administration	1,200,030	1,145,485	1,425,488	1,927,735	502,247	35.2%
Facilities Maintenance	12,260,213	20,222,466	15,254,797	19,187,457	3,932,660	25.8%
Metropolitan Planning Organization	434,664	654,398	550,173	555,716	5,543	1.0%
Municipal Recreation Complex	5,051,856	3,723,000	7,843,879	8,391,096	547,217	7.0%
Parking Division	5,541,877	5,594,102	5,996,713	6,363,772	367,059	6.1%
Parks Division	13,918,361	21,194,725	16,247,453	17,846,418	1,598,965	9.8%
Complete Streets Division	18,806,207	19,205,380	11,896,032	12,245,589	349,557	2.9%
Transit	9,573,051	11,842,458	12,529,528	14,214,186	1,684,658	13.4%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,731,969**	**8,987,906**	**12.5%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	21,808,242	25,366,671	27,510,356	31,698,795	4,188,439	15.2%
Contractuals & Utilities	12,433,174	12,206,210	16,264,303	15,853,300	(411,003)	-2.5%
Repairs & Maintenance	2,581,244	2,043,705	3,480,555	3,894,447	413,892	11.9%
Supplies	2,227,847	2,111,226	2,346,667	2,342,596	(4,071)	-0.2%
Insurance	2,315,341	2,022,576	2,166,614	2,025,985	(140,629)	-6.5%
Other Operating Costs	9,130,701	9,620,708	5,629,004	7,279,571	1,650,567	29.3%
Capital Purchases	5,096,536	6,714,553	4,136,032	4,826,640	690,608	16.7%
Debt Service	1,162,381	1,229,231	4,479,000	3,390,117	(1,088,883)	-24.3%
Transfers to Other Funds	10,030,792	22,267,134	5,731,532	9,420,518	3,688,986	64.4%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,731,969**	**8,987,906**	**12.5%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	28,985,909	37,040,272	30,230,696	34,019,021	3,788,325	12.5%
Resource Conservation	168,117	181,508	185,517	189,670	4,153	2.2%
City Drainage Fund	1,089,736	2,244,125	3,316,540	3,591,329	274,789	8.3%
Impact Fees Fund	2,106,152	1,938,504	-	-	-	N/A
Transportation Grants	501,535	727,456	679,552	1,125,307	445,755	65.6%
Community Development	1,117,260	226,407	-	-	-	N/A
Plaza Use Fund	43,914	126,352	35,500	35,500	-	0.0%
Public Facilities Fund	145,696	-	-	-	-	N/A
Quality of Life	95,696	283,425	251,650	252,650	1,000	0.4%
Streets & Roadways	2,730,650	2,373,138	1,762,470	1,843,090	80,620	4.6%
1/2% GRT Income Fund	4,798,712	11,469,661	4,403,702	7,194,207	2,790,505	63.4%
Railyard Properties	1,397,210	1,201,157	2,787,346	1,993,833	(793,513)	-28.5%
Midtown Campus	4,784,087	4,683,508	4,773,939	5,262,197	488,258	10.2%
Municipal Recreation Complex	3,773,528	3,723,000	4,920,289	5,216,798	296,509	6.0%
Parking	5,541,877	5,594,102	5,996,713	6,363,772	367,059	6.1%
Transit Bus System	9,506,181	11,769,399	12,400,149	13,644,595	1,244,446	10.0%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,731,969**	**8,987,906**	**12.5%**

CITY OF SANTA FE
REGIONAL AIRPORT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	2,614,327	3,574,688	3,772,121	3,778,552	6,431	0.2%
Contractuals & Utilities	1,064,107	337,580	153,700	189,200	35,500	23.1%
Repairs & Maintenance	215,757	268,193	206,000	927,500	721,500	350.2%
Supplies	272,939	659,583	326,000	475,000	149,000	45.7%
Insurance	83,447	139,942	153,021	181,320	28,299	18.5%
Other Operating Costs	2,013,693	2,977,945	701,055	1,032,460	331,405	47.3%
Capital Purchases	80,069	96,340	70,000	1,155,000	1,085,000	1550.0%
Transfers to Other Funds	-	20,634	-	-	-	N/A
TOTAL REGIONAL AIRPORT	**6,344,339**	**8,074,904**	**5,381,897**	**7,739,032**	**2,357,135**	**43.8%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Airport Fund	6,344,339	8,074,904	5,381,897	7,739,032	2,357,135	43.8%
TOTAL REGIONAL AIRPORT	**6,344,339**	**8,074,904**	**5,381,897**	**7,739,032**	**2,357,135**	**43.8%**

CITY OF SANTA FE
TOURISM SANTA FE - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Santa Fe Civic Center	5,919,304	7,321,648	8,605,275	9,368,057	762,782	8.9%
Visitors Bureau	5,807,609	7,261,247	7,663,875	8,910,731	1,246,856	16.3%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	3,386,663	3,986,931	4,136,679	4,340,017	203,338	4.9%
Contractuals & Utilities	1,295,969	2,153,482	2,241,100	2,618,700	377,600	16.8%
Repairs & Maintenance	136,189	132,177	186,000	198,040	12,040	6.5%
Supplies	220,193	216,412	224,950	873,482	648,532	288.3%
Insurance	137,973	171,541	164,531	168,743	4,212	2.6%
Other Operating Costs	5,981,009	7,224,868	6,049,807	7,564,669	1,514,862	25.0%
Capital Purchases	65,843	119,033	1,350,000	595,000	(755,000)	-55.9%
Debt Service	450,787	396,625	1,758,386	1,761,148	2,762	0.2%
Transfers to Other Funds	52,286	181,826	157,697	158,989	1,292	0.8%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Lodgers' Tax Fund	5,807,609	7,261,247	7,663,875	8,910,731	1,246,856	16.3%
Santa Fe Convention Center	5,919,304	7,321,648	8,605,275	9,368,057	762,782	8.9%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

CITY OF SANTA FE, NEW MEXICO

RESOLUTION NO. 2026-____

INTRODUCED BY:

Mayor Michael J. Garcia

A RESOLUTION

ADOPTING THE CITY OF SANTA FE'S FISCAL YEAR 2026/2027 OPERATING BUDGET FOR THE CITY OF SANTA FE.

WHEREAS, pursuant to the City of Santa Fe's ("City's") Charter, Section 5.01(M), the Mayor worked with City of Santa Fe's personnel and prepared an annual budget and proposed spending priorities for review and approval by the Finance Committee and Governing Body; and

WHEREAS, the Budget represents positive collaboration among departmental staff and elected officials;

WHEREAS, the proposed Budget addresses the City's needs and goals for Fiscal Year 2026/2027; and

WHEREAS, the City must "furnish and file with the" Local Government Division of the Department of Finance and Administration, "on or before June 1 of each year, a proposed budget for the next fiscal year", in accordance with NMSA 1978 Section 6-6-2.

NOW, THEREFORE, BE IT RESOLVED BY THE GOVERNING BODY OF THE CITY OF SANTA FE, that the Governing Body hereby adopts the Budget as to funds, categories, and departments.

BE IT FURTHER RESOLVED that the Governing Body respectfully requests approval of the budget by the Local Government Division of the New Mexico Department of Finance and Administration.

PASSED, APPROVED, and ADOPTED this _____ day of _____, 2026.

_____

MICHAEL J. GARCIA, MAYOR

ATTEST:

_____

GERALYN F. CARDENAS, CITY CLERK

APPROVED AS TO FORM:

Marcos D. Martinez

Marcos D. Martinez (May 8, 2026 13:38:57 MDT)

MARCOS D. MARTÍNEZ, CITY ATTORNEY

Legislation/2026/Resolution/Fiscal Year 2027 Budget

10758.1

EXHIBIT A

PROPOSED FISCAL YEAR 2027 BUDGET

ALL FUNDS SUMMARY

CITY OF SANTA FE
ALL FUNDS - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Local/State-Shared Taxes:							
-Gross Receipts Tax	158,080,046	169,534,967	173,964,469	167,400,000	178,537,742	11,137,742	6.7%
-Property Tax	12,149,080	12,502,649	12,767,886	13,171,757	14,601,857	1,430,100	10.9%
-Franchise Fees	5,668,146	5,291,041	5,418,561	5,647,741	5,586,036	(61,705)	-1.1%
-Lodgers' Tax	19,948,448	16,229,165	17,923,699	18,000,001	18,128,020	128,019	0.7%
-Gasoline Tax	1,561,558	1,631,126	1,452,729	1,680,000	1,587,951	(92,049)	-5.5%
-Other Taxes	1,206,662	1,304,150	1,240,722	1,308,468	1,263,170	(45,298)	-3.5%
Subtotal - Taxes	*198,613,941*	*206,493,099*	*212,768,067*	*207,207,967*	*219,704,776*	*12,496,809*	*6.0%*
Licenses & Permits:							
-Business Licenses	912,765	758,008	751,396	816,300	691,827	(124,473)	-15.2%
-Building/Zoning Permits	3,945,947	4,790,704	4,214,670	3,155,000	3,755,000	600,000	19.0%
-Other Licenses & Permits	171,689	141,734	184,559	155,000	182,126	27,126	17.5%
Subtotal - Licenses & Permits	*5,030,400*	*5,690,446*	*5,150,625*	*4,126,300*	*4,628,953*	*502,653*	*12.2%*
Fees & Service Charges:							
-Airport Fees	2,051,120	2,156,373	3,446,571	5,002,630	6,378,000	1,375,370	27.5%
-Ambulance Fees	4,649,371	3,820,330	7,362,487	5,114,308	5,887,781	773,473	15.1%
-Civic Center Fees	629,296	416,855	785,551	583,000	895,000	312,000	53.5%
-Housing Fees	978,427	1,608,969	1,431,062	877,540	833,000	(44,540)	-5.1%
-Impact Fees	2,574,677	4,286,993	1,558,901	3,827,254	4,478,138	650,884	17.0%
-Insurance Premiums	27,542,821	32,828,591	34,095,408	32,798,891	35,145,184	2,346,293	7.2%
-Meals Fees	80,247	65,244	57,989	77,400	77,400	-	0.0%
-Parking Fees	3,918,405	4,843,050	4,883,143	5,150,500	5,450,000	299,500	5.8%
-Planning/Land Use Fees	449,523	165,009	1,162,565	694,500	540,200	(154,300)	-22.2%
-Police/Court Fees	626,617	592,138	904,166	474,392	561,403	87,011	18.3%
-Public Transportation Fees	229,089	238,753	219,315	235,500	249,630	14,130	6.0%
-Recreation Fees	2,204,704	3,096,693	3,702,744	3,357,349	3,403,150	45,801	1.4%
-Solid Waste Fees	15,473,829	16,147,451	16,685,357	16,550,529	15,514,942	(1,035,587)	-6.3%
-Wastewater Fees	18,476,058	15,154,599	15,004,927	13,993,545	14,061,673	68,128	0.5%
-Water Fees	35,764,431	43,710,877	38,642,717	37,727,253	37,870,396	143,143	0.4%
-Reimbursed Expenses	14,880,751	21,359,460	22,944,169	23,694,431	34,510,057	10,815,626	45.6%
-Other Fees/Services	755,503	3,587,030	3,968,337	3,918,896	3,716,021	(202,875)	-5.2%
Subtotal - Fees & Services	*131,284,868*	*154,078,417*	*156,855,409*	*154,077,918*	*169,571,975*	*15,494,057*	*10.1%*
Fines & Forfeitures:							
-Parking Fines	533,465	460,469	448,621	525,000	525,000	-	0.0%
-Violations Fines	16,271	16,647	10,779	16,653	16,653	-	0.0%
-Other Fines & Forfeitures	190,220	155,698	120,448	153,750	153,450	(300)	-0.2%
Subtotal - Fines & Forfeitures	*739,956*	*632,815*	*579,848*	*695,403*	*695,103*	*(300)*	*0.0%*

[Continued next page]

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
ALL FUNDS - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
[Revenues by Category - continued]							
Rents/Royalties/Concessions:							
-Airport Rentals	(5,599)	(112,796)	68,959	170,000	400,600	230,600	135.6%
-Equipment Rentals	34,269	25,553	21,653	27,000	27,000	-	0.0%
-Parks & Recreation - Rentals	283,510	295,116	250,831	302,750	302,750	-	0.0%
-Other Rentals	2,435,262	3,018,972	2,152,001	3,753,635	3,185,608	(568,027)	-15.1%
Subtotal - Rents/Royalties	*2,747,441*	*3,226,844*	*2,493,443*	*4,253,385*	*3,915,958*	*(337,427)*	*-7.9%*
Miscellaneous Revenues:							
-Insurance Recoveries	6,971	96,659	-	100,000	100,000	-	0.0%
-Sales Revenue	698,130	1,090,468	1,426,691	1,322,024	112,840	(1,209,184)	-91.5%
-Other Misc. Revenue	4,138,531	2,309,196	(1,461,974)	4,959,688	6,853,574	1,893,886	38.2%
Subtotal - Miscellaneous	*4,843,631*	*3,496,323*	*(35,282)*	*6,381,712*	*7,066,414*	*684,702*	*10.7%*
Intergovernmental Grants:							
-State Grants	4,675,031	4,668,053	8,944,961	5,479,143	6,427,469	948,326	17.3%
-Federal Grants	4,216,318	8,878,828	11,340,342	4,312,383	7,170,773	2,858,390	66.3%
-SF County Grants	(12,144)	70,487	478,364	244,698	252,092	7,394	3.0%
-Other Grants	10,000	20,000	228,223	-	1,642,023	1,642,023	N/A
Subtotal - Intergovernmental	*8,889,205*	*13,637,368*	*20,991,891*	*10,036,224*	*15,492,357*	*5,456,133*	*54.4%*
Interest on Investments	1,880,058	11,977,762	15,608,940	14,965,784	12,820,647	(2,145,137)	-14.3%
Transfers In	54,330,427	68,494,322	86,446,134	79,777,933	79,070,300	(707,633)	-0.9%
TOTAL REVENUES	**408,359,928**	**467,727,396**	**500,859,075**	**481,522,626**	**512,966,483**	**31,443,857**	**6.5%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

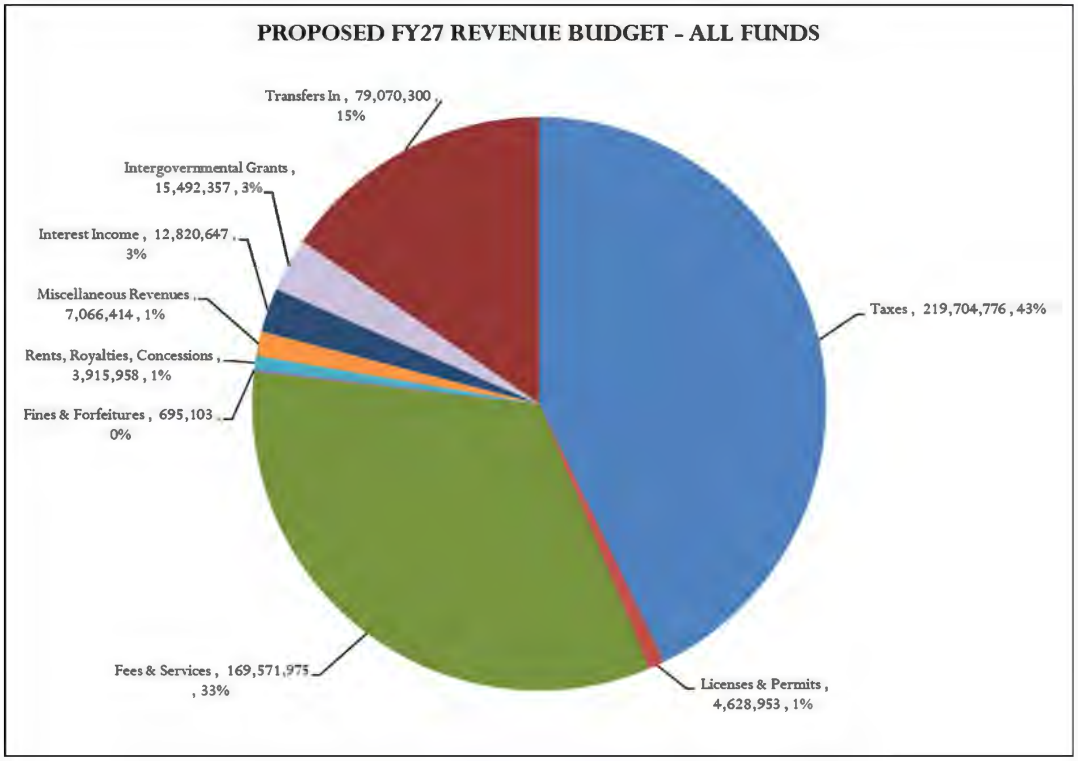
PROPOSED FISCAL YEAR 2027 BUDGET

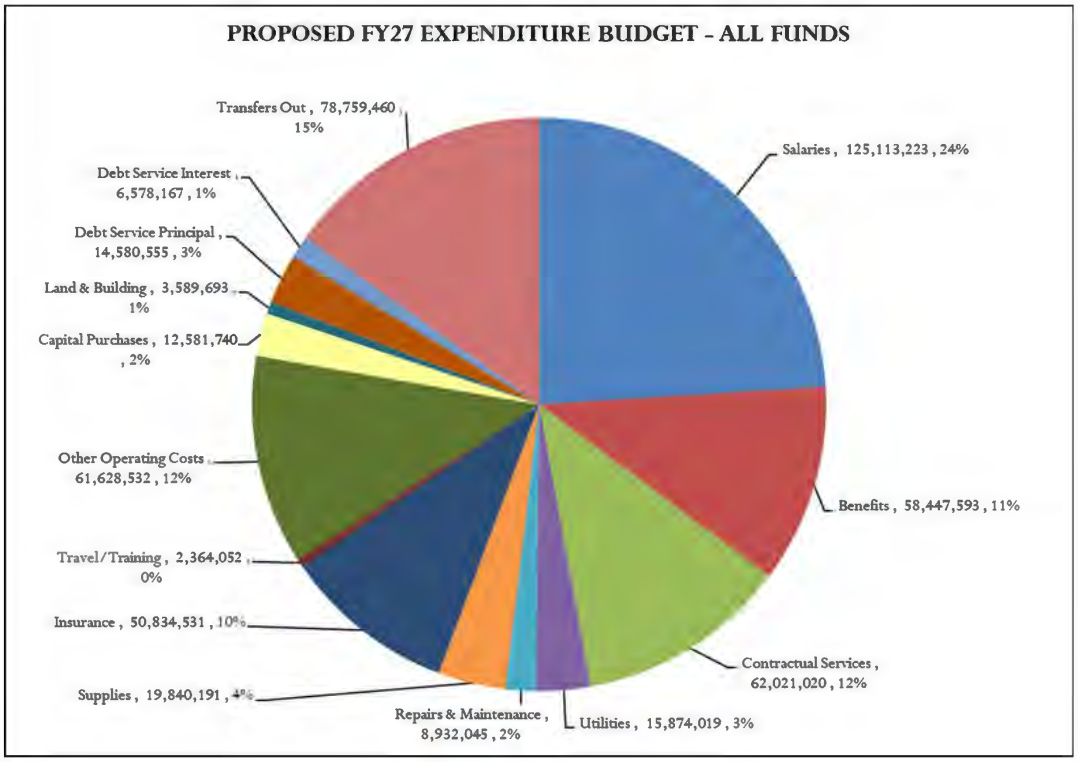
CITY OF SANTA FE
ALL FUNDS - EXPENDITURES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Personnel Services:							
-Salaries	87,006,557	94,031,822	104,388,361	114,831,571	125,113,223	10,281,652	9.0%
-Benefits	25,923,600	42,861,499	49,165,065	55,459,448	58,447,593	2,988,145	5.4%
Subtotal - Personnel Services	*112,930,157*	*136,893,321*	*153,553,426*	*170,291,019*	*183,560,816*	*13,269,797*	*7.8%*
Operating Expenses:							
-Contractual Services	33,117,885	39,728,204	42,813,653	49,028,138	62,021,020	12,992,882	26.5%
-Utilities	14,259,390	14,607,707	14,642,568	16,763,777	15,874,019	(889,758)	-5.3%
-Repairs & Maintenance	7,213,214	6,973,357	7,896,216	10,321,906	8,932,045	(1,389,861)	-13.5%
-Supplies	12,229,321	12,434,704	13,979,996	15,718,939	19,840,191	4,121,252	26.2%
-Insurance	31,911,781	38,610,663	40,520,644	47,887,157	50,834,531	2,947,374	6.2%
-Travel/Training	1,075,678	1,185,636	1,448,718	1,854,329	2,364,052	509,723	27.5%
-Other Operating Costs	54,112,499	63,364,261	62,938,270	51,633,782	61,628,532	9,994,750	19.4%
Subtotal - Operating Expenses	*153,919,768*	*176,904,532*	*184,240,065*	*193,208,028*	*221,494,390*	*28,286,362*	*14.6%*
Capital Outlay:							
-Capital Purchases	159,528	9,550,555	11,431,827	10,890,068	12,581,740	1,691,672	15.5%
-Land & Building	960,535	3,456,527	5,686,821	3,306,443	3,589,693	283,250	8.6%
Subtotal - Capital Outlay	*1,120,062*	*13,007,082*	*17,118,648*	*14,196,511*	*16,171,433*	*1,974,922*	*13.9%*
Debt Service:							
-Principal	8,250,699	8,916,053	9,221,175	16,476,768	14,580,555	(1,896,213)	-11.5%
-Interest	8,179,800	7,412,736	6,735,646	6,084,329	6,578,167	493,838	8.1%
-Other Debt Service	(970,457)	(825,913)	(680,358)	-	-	-	N/A
Subtotal - Debt Service	*15,460,042*	*15,502,877*	*15,276,463*	*22,561,097*	*21,158,722*	*(1,402,375)*	*-6.2%*
Transfers Out	63,855,814	83,144,147	111,814,252	80,332,737	78,759,460	(1,573,277)	-2.0%
TOTAL EXPENDITURES	**347,285,844**	**425,451,958**	**482,002,854**	**480,589,392**	**521,144,821**	**40,555,429**	**8.4%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

PROPOSED FISCAL YEAR 2027 BUDGET





PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
ALL FUNDS - EXPENDITURES BY DEPARTMENT
FY 2022/23 THROUGH FY 2026/27

DEPARTMENT	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Community Engagement	2,468,480	2,796,069	2,716,823	3,827,614	3,645,850	(181,764)	-4.7%
Community Services	25,811,343	33,840,445	42,646,397	40,308,146	42,874,349	2,566,203	6.4%
Economic Development	5,924,665	7,569,183	11,536,605	7,984,187	8,952,581	968,394	12.1%
Emergency Management	430,590	542,307	560,952	948,098	1,103,460	155,362	16.4%
Finance	25,294,836	29,116,965	32,688,516	26,326,485	22,676,368	(3,650,117)	-13.9%
Fire	25,639,372	30,823,543	39,409,906	35,903,389	40,963,356	5,059,967	14.1%
General Government	14,972,717	15,942,012	16,678,851	21,217,755	24,467,977	3,250,222	15.3%
Human Resources	27,425,845	28,000,468	27,945,254	32,349,993	33,784,182	1,434,189	4.4%
Info. Tech. & Telecomm.	11,430,812	15,506,239	18,741,662	15,019,557	23,838,283	8,818,726	58.7%
Metropolitan Redevelopment Agency	-	98,838	571,648	594,555	674,847	80,292	13.5%
Planning & Land Use	17,007,036	14,228,688	17,936,446	16,976,182	18,610,050	1,633,868	9.6%
Police	28,940,437	39,775,400	41,639,201	42,113,479	47,831,668	5,718,189	13.6%
Public Utilities	65,344,464	74,800,912	74,931,476	100,717,264	100,440,306	(276,958)	-0.3%
Public Works	50,087,150	66,786,259	83,582,014	71,744,063	80,542,299	8,798,236	12.3%
Regional Airport	3,123,353	6,344,339	8,074,904	5,381,897	7,739,032	2,357,135	43.8%
TOURISM Santa Fe	10,054,083	11,726,913	14,582,895	16,269,150	18,278,788	2,009,638	12.4%
*Non-Departmental**	*33,330,661*	*47,553,380*	*47,759,306*	*42,907,578*	*44,721,425*	1,813,847	4.2%
TOTAL EXPENDITURES	**347,285,844**	**425,451,958**	**482,002,854**	**480,589,392**	**521,144,821**	**40,555,429**	**8.4%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

PROPOSED FISCAL YEAR 2027 BUDGET

GENERAL FUND SUMMARY

CITY OF SANTA FE
GENERAL FUND - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

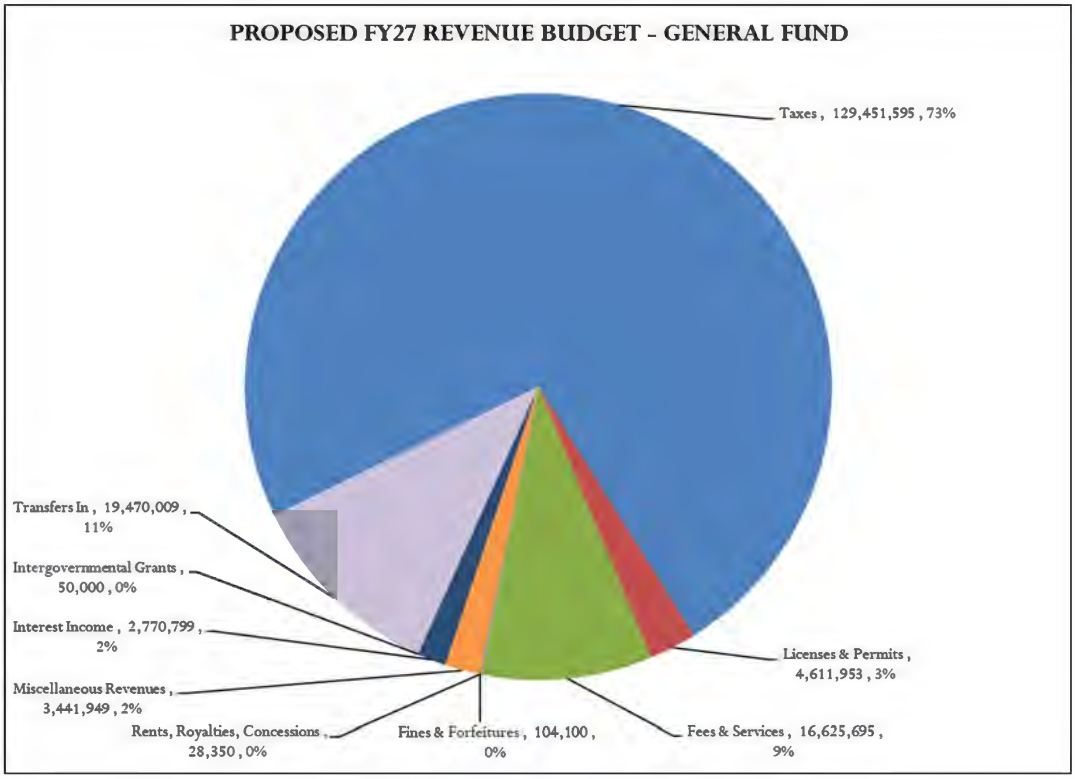
CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Local/State-Shared Taxes:							
-Gross Receipts Tax	98,962,863	106,133,722	108,907,004	104,797,172	111,103,376	6,306,204	6.0%
-Property Tax	9,516,085	10,270,979	10,811,408	11,197,436	11,499,013	301,577	2.7%
-Franchise Fees	5,607,490	5,236,545	5,366,831	5,580,741	5,586,036	5,295	0.1%
-Other Taxes	1,206,662	1,304,150	1,240,722	1,308,468	1,263,170	(45,298)	-3.5%
Subtotal - Taxes	*115,293,100*	*122,945,396*	*126,325,966*	*122,883,817*	*129,451,595*	*6,567,778*	*5.3%*
Licenses & Permits:							
-Business Licenses	912,765	758,008	751,396	816,300	691,827	(124,473)	-15.2%
-Building/Zoning Permits	3,945,937	4,790,704	4,214,670	3,155,000	3,755,000	600,000	19.0%
-Other Licenses & Permits	164,389	133,984	177,529	138,000	165,126	27,126	19.7%
Subtotal - Licenses & Permits	*5,023,090*	*5,682,696*	*5,143,595*	*4,109,300*	*4,611,953*	*502,653*	*12.2%*
Fees & Service Charges:							
-Ambulance Fees	4,649,371	3,820,330	7,362,487	5,114,308	5,887,781	773,473	15.1%
-Impact Fees	2,800	-	-	3,000	3,000	-	0.0%
-Planning/Land Use Fees	299,523	315,009	1,162,565	694,500	540,200	(154,300)	-22.2%
-Police/Court Fees	32,531	24,098	259,247	30,989	20,000	(10,989)	-35.5%
-Recreation Fees	296,206	329,153	337,588	315,350	315,350	-	0.0%
-Reimbursed Expenses	5,427,430	6,761,864	6,807,486	8,807,129	9,691,459	884,330	10.0%
-Other Fees/Services	80,058	82,722	108,105	303,500	167,905	(135,595)	-44.7%
Subtotal - Fees & Services	*10,787,919*	*11,333,176*	*16,037,479*	*15,268,776*	*16,625,695*	*1,356,919*	*8.9%*
Fines & Forfeitures:							
-Violations Fines	9,413	494	459	500	500	-	0.0%
-Other Fines & Forfeitures	137,443	98,942	73,799	103,600	103,600	-	0.0%
Subtotal - Fines & Forfeitures	*146,856*	*99,436*	*74,258*	*104,100*	*104,100*	-	*0.0%*
Rents/Royalties/Concessions:							
-Parks & Recreation - Rentals	24,263	17,310	10,292	19,750	19,750	-	0.0%
-Other Rentals	803	8,581	10,100	8,600	8,600	-	0.0%
Subtotal - Rents/Royalties	*25,066*	*25,890*	*20,392*	*28,350*	*28,350*	-	*0.0%*
Miscellaneous Revenues:							
-Sales Revenue	72,308	85,808	10,478	1,000,000	-	(1,000,000)	-100.0%
-Other Misc. Revenue	(1,821,191)	(578,593)	(3,764,505)	128,558	3,441,949	3,313,391	2577.4%
Subtotal - Miscellaneous	*(1,748,883)*	*(492,785)*	*(3,754,027)*	*1,128,558*	*3,441,949*	*2,313,391*	*205.0%*
Intergovernmental Grants:							
-State Grants	-	-	-	-	50,000	50,000	N/A
Subtotal - Intergovernmental	-	-	-	-	*50,000*	*50,000*	*N/A*
Interest on Investments	1,517,465	697,729	3,474,654	3,134,105	2,770,799	(363,306)	-11.6%
Transfers In	3,104,936	3,545,419	5,831,753	14,394,600	19,470,009	5,075,409	35.3%
TOTAL REVENUES	**134,149,549**	**143,836,957**	**153,154,069**	**161,051,606**	**176,554,450**	**15,502,844**	**9.6%**

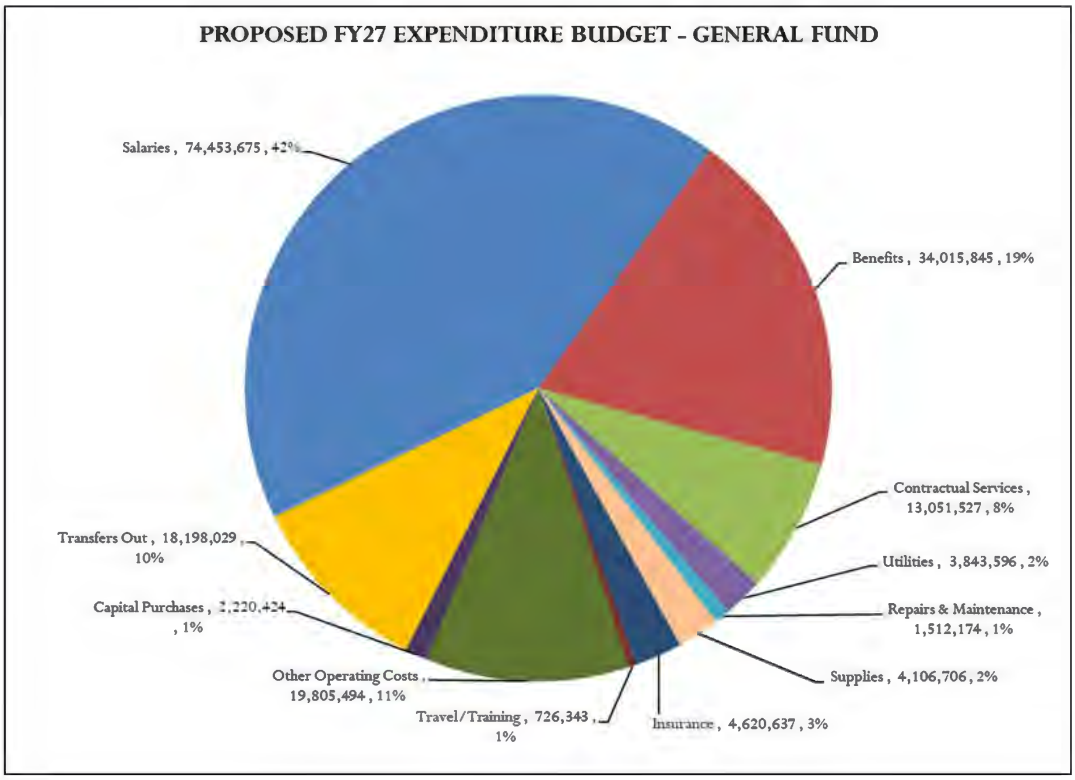
PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
GENERAL FUND - EXPENDITURES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Personnel Services:							
-Salaries	53,481,064	57,605,727	63,694,974	68,557,010	74,453,675	5,896,665	8.6%
-Benefits	25,151,714	27,733,949	30,783,006	32,351,761	34,015,845	1,664,084	5.1%
Subtotal - Personnel Services	*78,632,778*	*85,339,676*	*94,477,981*	*100,908,771*	*108,469,520*	*7,560,749*	*7.5%*
Operating Expenses:							
-Contractual Services	8,683,766	10,093,712	10,488,005	11,666,496	13,051,527	1,385,031	11.9%
-Utilities	3,878,621	4,221,509	3,648,325	4,187,596	3,843,596	(344,000)	-8.2%
-Repairs & Maintenance	1,370,827	994,212	645,664	1,186,829	1,512,174	325,345	27.4%
-Supplies	3,400,538	3,818,559	3,973,239	3,865,042	4,106,706	241,664	6.3%
-Insurance	1,780,229	4,616,911	5,015,002	5,133,798	4,620,637	(513,161)	-10.0%
-Travel/Training	357,977	422,239	544,980	618,455	726,343	107,888	17.4%
-Other Operating Costs	9,329,024	13,632,507	15,296,978	12,674,557	19,805,494	7,130,937	56.3%
Subtotal - Operating Expenses	*28,800,982*	*37,799,649*	*39,612,193*	*39,332,773*	*47,666,477*	*8,333,704*	*21.2%*
Capital Outlay:							
-Capital Purchases	17,164	4,558,722	4,181,080	1,522,201	2,000,424	478,223	31.4%
-Land & Building	228,659	129,987	435,974	220,000	220,000	-	0.0%
Subtotal - Capital Outlay	*245,823*	*4,688,709*	*4,617,054*	*1,742,201*	*2,220,424*	*478,223*	*27.4%*
Transfers Out	11,627,855	12,741,913	35,253,226	19,067,861	18,198,029	(869,832)	-4.6%
TOTAL EXPENDITURES	**119,307,438**	**140,569,947**	**173,960,454**	**161,051,606**	**176,554,450**	**15,502,844**	**9.6%**

PROPOSED FISCAL YEAR 2027 BUDGET





PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
GENERAL FUND EXPENDITURES BY DEPARTMENT
FY 2022/23 THROUGH FY 2026/27

DEPARTMENT	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Community Engagement	2,400,406	2,644,069	2,716,823	3,227,614	3,645,850	418,236	13.0%
Community Services	11,755,168	13,786,916	20,925,797	19,876,868	19,400,417	(476,451)	-2.4%
Economic Development	2,295,710	2,796,895	4,512,871	2,848,991	3,123,868	274,877	9.6%
Emergency Management	167,156	189,176	310,322	335,924	717,812	381,888	113.7%
Finance	6,959,811	8,776,466	8,695,902	8,751,208	8,825,022	73,814	0.8%
Fire	25,216,546	29,437,443	36,961,250	34,740,216	39,040,901	4,300,685	12.4%
General Government	5,557,789	6,696,573	7,273,455	8,173,823	9,640,867	1,467,044	17.9%
Human Resources	6,432,314	4,087,127	2,513,524	2,595,897	3,024,788	428,891	16.5%
Info. Tech. & Telecomm.	-	-	2,487,000	-	-	-	N/A
Planning & Land Use	9,943,714	8,366,438	12,717,660	12,105,390	13,787,841	1,682,451	13.9%
Police	26,759,108	34,491,909	36,470,397	36,813,085	40,028,902	3,215,817	8.7%
Public Works	20,562,355	28,985,909	37,040,272	30,230,696	34,019,021	3,788,325	12.5%
Non-Departmental	*1,257,362*	*311,026*	*1,335,179*	*1,351,894*	*1,299,161*	(52,733)	-3.9%
TOTAL GENERAL FUND	**119,307,438**	**140,569,947**	**173,960,454**	**161,051,606**	**176,554,450**	**15,502,844**	**9.6%**

PROPOSED FISCAL YEAR 2027 BUDGET

FY27 Proposed Budget - Position Count

Department Name	FY26 Original FTE	FY26 Current FTE	FY27 Proposed FTE	FY27 - # of Vacant Positions	Vacancy Rate Starting FY27	Notes - Changes from FY26 to FY27 (transfers, new positions, etc.)
Community Engagement	**21.0**	**21.0**	**23.0**	**3.0**	**13%**	**FY26 - 1 New FTE:** (Constituent Services) 1 Paralegal; **FY26 - 1 FTE Transferred and Reclassed:** 1 Communications Director moved from Constituent Services to General Government/City Manager; **FY27 - 2 New FTE:** (Constituent Services) 1 Translator, 1 Broadcast & Streaming Production Specialist
City Clerk	8.0	9.0	9.0	1	11%	
Constituent Services	13.0	12.0	14.0	2	14%	
Community Services	**196.5**	**202.5**	**202.5**	**33**	**16%**	**FY26 - 5 New FTE:** (Recreation) 2 Recreation Supervisors, (Youth & Family) 2 Program Managers, 1 Data Reporting & Policy Development Manager; **FY26 - 1 FTE Unfrozen:** (Recreation) 1 Recreation Supervisor, 1 Youth Program Coordinator; **FY26 - 1 FTE Frozen:** (Senior Services) 1 Transit Driver III; **FY26 - 1 FTE Transferred:** 1 Contracts Administrator moved from Library to Community Services Admin.
Community Services Admin.	6.5	7.5	7.5	2	27%	
Library	46.5	45.5	45.5	2	4%	
Recreation	82.0	86.0	86.0	22	26%	
Senior Services	53.5	52.5	52.5	5	10%	
Youth & Family	8.0	11.0	11.0	2	18%	
Economic Development	**18.0**	**21.0**	**22.0**	**5**	**23%**	**FY26 - 1 New FTE:** (Arts and Culture) 1 Administrative Manager; **FY26 - 2 New FTE:** (Economic Development) 2 term Economic Development Specialist; **FY27 - 2 New FTE:** (Economic Development) 2 term Project Manager; **FY27 - 1 FTE Frozen:** (Economic Development) 1 Community Development Director
Arts and Culture	5.0	6.0	6.0	1	17%	
Economic Development	11.0	13.0	14.0	4	29%	
Santa Fe Film	2.0	2.0	2.0	0	0%	
Emergency Management	**2.0**	**2.0**	**2.0**	**1**	**50%**	
Finance	**56.4**	**58.4**	**58.4**	**14.0**	**24%**	**FY26 - 2 New FTE:** (Budget) 1 Budget Analyst, (Finance Admin.) 1 Project Administrator
Finance Admin.	5.0	6.0	6.0	2	33%	
Accounting	18.4	18.4	18.4	6	33%	
Budget	4.0	5.0	5.0	2	40%	
Fleet Management	13.0	13.0	13.0	2	15%	
Purchasing	6.0	6.0	6.0	1	17%	
Treasurer	10.0	10.0	10.0	1	10%	
Fire	**211.0**	**210.0**	**210.0**	**16**	**8%**	**FY26 - 3 New FTE:** (Fire Admin.) 1 Project Specialist, 1 Business Operations Manager, 1 Fiscal Administrator; **FY26 - 3 FTE Unfrozen:** (Fire Admin.) 1 Administrative Assistant, (Fire Operations) 1 Forestry Tech, (Fire Support Svcs.) 1 Fire Apparatus Tech I; **FY26 - 2 FTE Transferred:** 1 Wildlife Urban Interface Specialist, 1 Fire Training Captain moved from Fire Operations to Support Svcs.
Fire Admin.	6.0	10.0	10.0	2	20%	
Fire Operations	168.0	167.0	167.0	10	6%	
Fire Support Services	37.0	33.0	33.0	4	12%	
General Government	**61.3**	**63.3**	**62.3**	**9**	**14%**	**FY26 - 4 New FTE:** (City Attorney) 1 term Paralegal Basic, 1 Legislation Coordinator, 1 Legislative Administrator, (Risk Mgmt.) 1 Risk & Safety Compliance Officer; **FY26 - 1 FTE Frozen:** (City Council) 1 Council Liaison, (Municipal Court) 1 Court Clerk; **FY27 - 1 FTE Transferred:** 1 Public Records Specialist moved from City Attorney to Police Admin.
Mayor	3.0	3.0	3.0	1	33%	
City Council	9.0	8.0	8.0	0	0%	
City Manager	5.3	5.3	5.3	1	19%	
City Attorney	20.0	23.0	22.0	6	27%	
Municipal Court	19.0	18.0	18.0	1	6%	
Risk Management & Safety	5.0	6.0	6.0	3	50%	
Human Resources	**18.0**	**17.0**	**18.0**	**2**	**11%**	**FY26 - 1 FTE Frozen:** Administrative Manager (temp); **FY27 - 1 New FTE:** 1 HR Information Systems Manager

[continued next page]

PROPOSED FISCAL YEAR 2027 BUDGET

FY27 Proposed Budget - Position Count

Department Name	FY26 Original FTE	FY26 Current FTE	FY27 Proposed FTE	FY27 - # of Vacant Positions	Vacancy Rate Starting FY27	Notes - Changes from FY26 to FY27 (transfers, new positions, etc.)
[continued from previous page]						
Info. Tech. & Telecomm.	**44.9**	**44.9**	**44.9**	**8**	**18%**	
ITT Admin.	5.0	5.0	5.0	1	20%	
ITT End User Services	9.0	9.0	9.0	1	11%	
Enterprise Application Services	7.0	7.0	7.0	4	57%	
Enterprise Resource Planning	12.9	12.9	12.9	1	8%	
Infrastructure Services	11.0	11.0	11.0	1	9%	
ITT Security & Compliance	0.0	0.0	0.0	0	0%	
Planning & Land Use	**70.0**	**71.0**	**69.0**	**14**	**178%**	**FY26 - 1 New FTE:** (Affordable Housing) 1 Project Manager; **FY26 - 3 FTE Unfrozen:** (Planning & Land Use) 1 Construction Inspector & 1 Construction Plans Examiner III unfrozen but not funded - will reflect as frozen unfunded in FY27; 1 Contracts Administrator; **FY27 - 2 New FTE:** (Affordable Housing) 2 Project Manager; **FY27 - 1 FTE Unfrozen:** (Planning & Land Use) 1 Engineer; **FY27- 2 FTE Frozen:** (Planning & Land Use) 1 Construction Inspector, 1 Construction Plans Examiner III
Land Use Admin.	8.0	7.0	7.0	1	14%	
Affordable Housing	5.0	6.0	6.0	4	67%	
Building Permit Div	11.0	11.0	10.0	4	40%	
Enforcemnt Division	0.0	8.0	8.0	0	0%	
Historic Preservation	5.0	5.0	5.0	1	20%	
Inspections Division	23.0	17.0	16.0	2	13%	
Planning Division	11.0	10.0	10.0	1	10%	
Technical Review Div	7.0	7.0	7.0	1	14%	
Metropolitan Redevelopment Agency	**2.0**	**4.0**	**3.0**	**2**	67%	**FY26 - 2 New FTE:** 1 Administrative Manager, 1 Project Manager
Police	**237.0**	**240.0**	**242.0**	**16.0**	**7%**	**FY26 - 5 New FTE:** (Police Admin.) 4 Project Specialist, 1 Police Records Supervisor; **FY26 - 2 FTE Unfrozen:** (Police Admin.) 1 Administrative Manager, 1 Public Safety Aide; **FY26 - 3 FTE Frozen:** (Police Admin.) 1 Project Admin, 1 Records Tech, 1 Admin. Manager; **FY27 - 1 FTE Transferred:** 1 Public Records Specialist moved from City Attorney to Police Admin.; **FY27 - 1 New FTE:** PIO/IPRA (position title TBD)
Police Admin.	51.0	54.0	56.0	6	11%	
Police Operations	186.0	186.0	186.0	10	5%	
Public Utilities	**261.7**	**256.7**	**259.7**	**47**	**18%**	**FY26 - 2 New FTE:** (UCS) 1 Utility Billing Division Director - retirement double fill (expires 7/1/27), (Water) 1 T&D Manager - retirement double fill (expired 10/29/25, not included in FY27); **FY26 - 1 FTE Transferred:** 1 Contracts Admin. moved from Buckman Direct Diversion to Utility Customer Service; **FY26 - 5 FTE Frozen:** (Water) unknown positions due to reclassifications and transfers between funds; **FY27 - Created New Division:** (Conservation & Sustainability) 10 total FTEs - transferred 6 FTE from Environmental Svcs., 2 FTE from Wastewater and 2 FTE from Water
Public Utilities Admin.	11.0	11.0	11.0	3	27%	
Conservation & Sustainability	0.0	0.0	10.0	4	40%	
Environmental Services	73.0	73.0	67.0	2	3%	
Utility Customer Service	29.7	31.7	31.7	6	19%	
Wastewater	68.3	66.3	64.3	20	31%	
Water	79.7	74.7	75.7	12	16%	
Public Works	**348.7**	**333.7**	**340.7**	77	**23%**	**FY26 - 1 FTE Unfrozen:** (Facilities) 1 Maintenance Specialist; **FY26 - 1 FTE Frozen:** (Facilities) 1 Custodian; **FY27 - 7 New FTE:** (Parks) 1 Superintendent, 1 Parks Maintenance Worker Senior, 5 Parks Maintenance Worker
Public Works Admin.	5.5	5.0	5.0	1	20%	
Facilities	56.0	55.0	55.0	8	15%	
Metropolitan Planning Organization	3.0	3.0	3.0	0	0%	
Municipal Recreation Complex	10.0	10.0	10.0	0	0%	
Parking	29.0	29.0	29.0	5	17%	
Parks Division	70.0	71.0	78.0	15	19%	
Complete Streets Division	59.7	53.7	53.7	12	22%	
Transit	115.5	107.0	107.0	36	34%	
Regional Airport	**32.0**	**37.0**	**37.0**	7	**19%**	**FY26 - 5 New FTE:** 3 Airport Shuttle Driver, 1 Custodian, 1 Airport Operations Officer
Tourism Santa Fe	**48.0**	**48.0**	**49.0**	**4**	**8%**	**FY26 - 1 New FTE Transferred:** 1 Parks Ranger Supervisor, moved from Visit Santa Fe to Convention Center; **FY27 - 1 New FTE:** 1 Assistant Operations Manager
Santa Fe Civic Center	23.0	24.0	24.0	1	4%	
Visitors Bureau	25.0	24.0	25.0	3	12%	
Total	**1,628.5**	**1,630.5**	**1,643.5**	**257**	**16%**	**FY26:** 29 New FTE, 10 Unfrozen FTE, 11 Frozen FTE; **FY27:** 14 New FTE, 3 Frozen FTE, 1 Unfrozen FTE

NOTE: some position counts are not whole numbers due to split-funded positions

CITY OF SANTA FE
COMMUNITY ENGAGEMENT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
City Clerk	1,307,582	1,235,156	2,219,430	1,710,894	(508,536)	-22.9%
Constituent Services	1,488,487	1,481,667	1,608,184	1,934,956	326,772	20.3%
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	1,640,182	1,721,159	2,235,713	2,506,242	270,529	12.1%
Contractuals & Utilities	312,521	430,383	432,965	410,567	(22,398)	-5.2%
Repairs & Maintenance	3,813	5,520	5,000	5,000	-	0.0%
Supplies	175,563	123,787	162,296	200,975	38,679	23.8%
Insurance	66,885	75,781	71,078	71,624	546	0.8%
Other Operating Costs	424,452	295,742	920,562	451,442	(469,120)	-51.0%
Capital Purchases	110,651	64,451	-	-	-	N/A
Transfers to Other Funds	62,000	-	-	-	-	N/A
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	2,644,069	2,716,823	3,227,614	3,645,850	418,236	13.0%
Franchise Fee Fund	62,000	-	-	-	-	N/A
Public Campaign Financing	90,000	-	600,000	-	(600,000)	-100.0%
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

CITY OF SANTA FE
COMMUNITY SERVICES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Community Services Administration	1,493,950	5,425,765	1,468,544	3,185,110	1,716,566	116.9%
Library	5,588,268	6,786,644	6,361,349	6,902,735	541,386	8.5%
Recreation	12,294,268	11,222,185	13,172,769	14,810,522	1,637,753	12.4%
Senior Services	6,615,371	8,613,160	9,353,907	10,127,452	773,545	8.3%
Youth & Family	7,848,588	10,598,643	9,951,577	7,848,530	(2,103,047)	-21.1%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	12,457,056	13,674,037	16,980,050	17,900,457	920,407	5.4%
Contractuals & Utilities	8,798,076	8,384,297	7,930,929	9,982,571	2,051,642	25.9%
Repairs & Maintenance	216,476	289,029	179,932	425,700	245,768	136.6%
Supplies	2,001,022	2,132,671	1,994,650	2,066,353	71,703	3.6%
Insurance	878,434	805,411	739,169	770,656	31,487	4.3%
Other Operating Costs	2,786,308	3,811,341	2,354,510	3,654,389	1,299,879	55.2%
Capital Purchases	624,376	1,443,043	167,011	348,656	181,645	108.8%
Transfers to Other Funds	6,078,697	12,106,569	9,961,895	7,725,567	(2,236,328)	-22.4%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	13,786,916	20,925,797	19,876,868	19,400,417	(476,451)	-2.4%
Law Enforcement	58,616	91,041	316,342	678,822	362,480	114.6%
Community Development	5,915,160	5,229,866	4,092,117	5,676,631	1,584,514	38.7%
Senior Citizen Grants/Programs	4,207,798	5,091,240	5,104,743	5,361,295	256,552	5.0%
Library	1,158,908	1,488,703	1,203,977	1,272,366	68,389	5.7%
Quality of Life	54,998	128,495	163,770	163,770	-	0.0%
Recreation Programs	3,350,247	3,960,010	4,683,100	4,860,884	177,784	3.8%
Special Recreation Leagues	4,548	2,846	5,800	5,800	-	0.0%
Genoveva Chavez Community Ctr.	5,303,254	5,728,400	4,861,429	5,454,364	592,935	12.2%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

CITY OF SANTA FE
DEPARTMENT OF ECONOMIC DEVELOPMENT & CREATIVE INDUSTRIES - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Arts & Culture	1,575,668	2,846,099	2,117,640	2,630,720	513,080	24.2%
Economic Development	5,993,515	8,121,528	5,361,592	5,792,366	430,774	8.0%
Santa Fe Film Office	-	568,978	504,955	529,495	24,540	4.9%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	1,670,299	1,853,561	2,482,896	2,691,734	208,838	8.4%
Contractuals & Utilities	2,648,404	3,370,622	1,477,204	1,617,187	139,983	9.5%
Repairs & Maintenance	1,569	8,261	4,000	3,700	(300)	-7.5%
Supplies	54,752	100,018	98,850	148,005	49,155	49.7%
Insurance	56,239	55,893	72,688	72,861	173	0.2%
Other Operating Costs	1,210,973	1,847,702	1,840,361	2,212,815	372,454	20.2%
Capital Purchases	-	85,773	-	-	-	N/A
Debt Service	-	5,000	-	-	-	N/A
Transfers to Other Funds	1,926,948	4,209,774	2,008,188	2,206,279	198,091	9.9%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	2,796,895	4,512,871	2,848,991	3,123,868	274,877	9.6%
Economic Development	2,551,568	2,844,857	2,412,107	2,547,412	135,305	5.6%
Lodgers' Tax Fund	1,534,296	2,713,181	1,990,938	2,486,998	496,060	24.9%
Community Development	645,052	763,800	100,494	121,086	20,592	20.5%
Santa Fe Film Office	-	568,978	504,955	529,495	24,540	4.9%
Santa Fe Convention Center	41,372	132,918	126,702	143,722	17,020	13.4%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

CITY OF SANTA FE
EMERGENCY MANAGEMENT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	229,189	293,242	273,538	323,881	50,343	18.4%
Contractuals & Utilities	98,352	7,892	243,021	16,495	(226,526)	-93.2%
Repairs & Maintenance	-	-	250	-	(250)	-100.0%
Supplies	103,340	37,425	217,351	246,601	29,250	13.5%
Insurance	7,327	8,071	6,604	9,183	2,579	39.1%
Other Operating Costs	75,253	119,907	131,176	431,142	299,966	228.7%
Capital Purchases	28,845	94,414	76,158	76,158	-	0.0%
TOTAL EMERGENCY MANAGEMENT	**542,307**	**560,952**	**948,098**	**1,103,460**	**155,362**	**16.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	189,176	310,322	335,924	717,812	381,888	113.7%
Emergency Services (grant funding)	258,037	227,958	612,174	385,648	(226,526)	-37.0%
Community Development	95,094	22,671	-	-	-	N/A
TOTAL EMERGENCY MANAGEMENT	**542,307**	**560,952**	**948,098**	**1,103,460**	**155,362**	**16.4%**

CITY OF SANTA FE
FINANCE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Finance Administration	1,278,975	1,312,151	1,601,441	1,893,305	291,864	18.2%
Accounting	5,383,862	3,706,177	3,097,808	2,903,443	(194,365)	-6.3%
Budget	18,200,890	23,404,980	16,387,733	12,484,831	(3,902,902)	-23.8%
Fleet Management	1,529,059	1,857,475	1,758,213	1,985,056	226,843	12.9%
Purchasing	1,639,225	963,654	1,031,152	1,203,888	172,736	16.8%
Treasury	1,084,953	1,444,078	2,450,138	2,205,845	(244,293)	-10.0%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,676,368**	**(3,650,117)**	**-13.9%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	4,840,314	5,962,505	6,960,781	7,009,061	48,280	0.7%
Contractuals & Utilities	4,107,679	2,109,544	2,482,700	2,015,000	(467,700)	-18.8%
Repairs & Maintenance	163,798	114,281	250,000	293,000	43,000	17.2%
Supplies	550,829	345,951	574,200	724,400	150,200	26.2%
Insurance	153,994	221,950	197,212	199,681	2,469	1.3%
Other Operating Costs	763,676	729,972	574,603	892,715	318,112	55.4%
Capital Purchases	12,292	85,914	20,000	50,000	30,000	150.0%
Transfers to Other Funds	18,524,383	23,118,399	15,266,989	11,492,511	(3,774,478)	-24.7%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,676,368**	**(3,650,117)**	**-13.9%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	8,776,466	8,695,902	8,751,208	8,825,022	73,814	0.8%
Capital Equipment Reserve	803,570	52,751	-	-	-	N/A
Lodgers' Tax Fund	93,455	137,562	352,734	177,122	(175,612)	-49.8%
Community Development	-	278	-	-	-	N/A
1/2% GRT Income Fund	17,914,415	22,244,547	15,464,330	11,689,168	(3,775,162)	-24.4%
Services to Other Depts	1,529,059	1,557,475	1,758,213	1,985,056	226,843	12.9%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,676,368**	**(3,650,117)**	**-13.9%**

CITY OF SANTA FE
FIRE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Fire Administration	4,003,767	5,932,596	3,483,855	6,272,055	2,788,200	80.0%
Fire Operations	20,593,763	25,840,021	25,541,866	27,060,515	1,518,649	5.9%
Support Services	6,226,012	7,637,289	6,877,668	7,630,786	753,118	11.0%
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	25,028,156	28,364,702	29,464,690	30,419,854	955,164	3.2%
Contractuals & Utilities	524,845	539,487	768,885	2,298,318	1,529,433	198.9%
Repairs & Maintenance	140,854	189,036	127,674	154,284	26,610	20.8%
Supplies	1,812,582	1,887,770	1,655,951	2,314,995	659,044	39.8%
Insurance	710,451	876,512	776,875	762,956	(13,919)	-1.8%
Other Operating Costs	1,292,611	3,360,884	2,116,782	3,912,880	1,796,098	84.9%
Capital Purchases	1,101,042	2,753,511	992,532	1,100,069	107,537	10.8%
Debt Service	89,839	214,844	-	-	-	N/A
Transfers to Other Funds	123,163	1,223,161	-	-	-	N/A
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	29,437,443	36,961,250	34,740,216	39,040,901	4,300,685	12.4%
Emergency Services	1,386,100	1,348,656	1,163,173	1,922,455	759,282	65.3%
Impact Fees Fund	-	1,100,000	-	-	-	N/A
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

CITY OF SANTA FE
GENERAL GOVERNMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Mayor's Office	668,199	406,883	667,169	733,795	66,626	10.0%
City Council	521,385	652,878	747,867	949,548	201,681	27.0%
City Manager	701,546	916,077	1,144,336	1,583,280	438,944	38.4%
City Attorney	2,939,449	3,207,144	3,147,697	3,692,722	545,025	17.3%
Internal Audit	837	173,975	150,000	200,000	50,000	33.3%
Municipal Court	1,964,734	1,934,989	2,377,354	2,518,122	140,768	5.9%
Risk Management	7,196,538	7,395,374	8,684,414	10,248,623	1,564,209	18.0%
Safety	1,949,324	1,991,533	4,298,918	4,541,887	242,969	5.7%
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,502,506	5,644,444	6,556,468	7,207,126	650,658	9.9%
Contractuals & Utilities	1,042,516	1,186,638	1,270,827	2,235,800	964,973	75.9%
Repairs & Maintenance	4,415	12,503	6,775	7,944	1,169	17.3%
Supplies	213,169	231,612	422,928	417,422	(5,506)	-1.3%
Insurance	8,118,866	8,731,916	11,642,810	13,010,307	1,367,497	11.7%
Other Operating Costs	974,726	869,618	1,186,947	1,539,378	352,431	29.7%
Capital Purchases	23,315	-	131,000	50,000	(81,000)	-61.8%
Transfers to Other Funds	62,500	2,120	-	-	-	N/A
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	6,696,573	7,273,455	8,173,823	9,640,867	1,467,044	17.9%
Law Enforcement	99,577	18,490	60,600	36,600	(24,000)	-39.6%
Risk Management	7,784,261	7,948,567	9,514,876	11,319,574	1,804,698	19.0%
Workers' Compensation	1,361,601	1,438,340	3,468,456	3,470,936	2,480	0.1%
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

CITY OF SANTA FE
HUMAN RESOURCES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	3,505,379	2,002,176	2,042,177	2,323,886	281,709	13.8%
Contractuals & Utilities	1,369,172	1,232,782	1,442,277	1,613,541	171,264	11.9%
Repairs & Maintenance	-	67	-	-	-	N/A
Supplies	32,950	60,643	115,320	115,320	-	0.0%
Insurance	22,670,557	24,089,218	28,297,999	29,155,109	857,110	3.0%
Other Operating Costs	347,409	324,764	377,220	479,502	102,282	27.1%
Capital Purchases	-	199	-	-	-	N/A
Transfers to Other Funds	75,000	235,405	75,000	96,824	21,824	29.1%
TOTAL HUMAN RESOURCES	**28,000,468**	**27,945,254**	**32,349,993**	**33,784,182**	**1,434,189**	**4.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	4,087,127	2,513,524	2,595,897	3,024,788	428,891	16.5%
Santa Fe Health/Dental	23,834,738	25,398,056	29,678,552	30,683,850	1,005,298	3.4%
Unemployment Claims	78,602	33,673	75,544	75,544	-	0.0%
TOTAL HUMAN RESOURCES	**28,000,468**	**27,945,254**	**32,349,993**	**33,784,182**	**1,434,189**	**4.4%**

CITY OF SANTA FE
INFORMATION TECHNOLOGY & TELECOMMUNICATIONS - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
ITT Administration	5,208,743	4,644,452	2,466,666	2,495,776	29,110	1.2%
End User Services	870,468	810,534	995,253	1,044,346	49,093	4.9%
Enterprise Application Services	2,254,979	4,904,828	2,752,479	4,961,402	2,208,923	80.3%
Enterprise Project Management	2,305,733	1,258,462	1,688,210	1,707,069	18,859	1.1%
Infrastructure Services	4,866,317	7,123,386	7,116,949	13,629,690	6,512,741	91.5%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,838,283**	**8,818,726**	**58.7%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,337,269	4,754,749	5,754,695	5,852,899	98,204	1.7%
Contractuals & Utilities	1,983,543	2,361,975	2,395,326	7,327,265	4,931,939	205.9%
Repairs & Maintenance	97,865	207,374	171,000	57,032	(113,968)	-66.6%
Supplies	1,246,244	2,312,322	1,943,221	4,379,836	2,436,615	125.4%
Insurance	97,986	199,165	154,947	156,839	1,892	1.2%
Other Operating Costs	3,061,424	5,398,800	2,744,100	4,093,982	1,349,882	49.2%
Capital Purchases	427,312	382,894	498,715	1,088,715	590,000	118.3%
Debt Service	4,596	14,970	-	-	-	N/A
Transfers to Other Funds	3,250,000	3,109,412	1,357,553	881,715	(475,838)	-35.1%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,838,283**	**8,818,726**	**58.7%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	-	2,487,000	-	-	-	N/A
1/2% GRT Income Fund	3,652,744	500,000	1,598,753	1,549,715	(49,038)	-3.1%
Services to Other Depts	11,853,495	15,754,662	13,420,804	22,288,568	8,867,764	66.1%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,838,283**	**8,818,726**	**58.7%**

CITY OF SANTA FE
METROPOLITAN REDEVELOPMENT AGENCY - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	95,505	280,848	304,396	404,921	100,525	33.0%
Contractuals & Utilities	-	257,769	271,326	202,218	(69,108)	-25.5%
Supplies	2,755	3,966	2,500	6,500	4,000	160.0%
Insurance	-	-	-	13,213	13,213	N/A
Other Operating Costs	578	25	16,333	47,995	31,662	193.9%
Capital Purchases	-	29,040	-	-	-	N/A
TOTAL METRO. REDEV. AGENCY	**98,838**	**571,648**	**594,555**	**674,847**	**80,292**	**13.5%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Economic Development	98,838	571,648	594,555	674,847	80,292	13.5%
TOTAL METRO. REDEV. AGENCY	**98,838**	**571,648**	**594,555**	**674,847**	**80,292**	**13.5%**

CITY OF SANTA FE
PLANNING & LAND USE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Land Use Administration	2,367,400	3,071,174	2,795,125	3,572,244	777,119	27.8%
Affordable Housing	7,395,395	9,602,417	8,623,080	8,775,829	152,749	1.8%
Building Permit Division	761,270	748,602	918,364	969,734	51,370	5.6%
Enforcement Division	-	230,175	11,120	786,524	775,404	6973.1%
Historic Preservation	512,549	562,682	596,405	615,488	19,083	3.2%
Inspections Division	1,887,809	1,990,066	2,191,763	1,815,092	(376,671)	-17.2%
Planning Division	789,780	1,058,819	1,106,288	1,164,812	58,524	5.3%
Technical Review	514,484	672,511	734,037	910,327	176,290	24.0%
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,610,050**	**1,633,868**	**9.6%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,760,345	6,249,650	6,939,025	7,890,242	951,217	13.7%
Contractuals & Utilities	5,890,619	6,811,529	5,721,590	6,078,885	357,295	6.2%
Repairs & Maintenance	-	-	2,549	2,549	-	0.0%
Supplies	76,864	61,622	108,670	79,770	(28,900)	-26.6%
Insurance	231,348	272,503	252,181	253,848	1,667	0.7%
Other Operating Costs	852,821	706,074	717,167	1,069,756	352,589	49.2%
Capital Purchases	723,854	81,525	235,000	235,000	-	0.0%
Transfers to Other Funds	692,837	3,753,544	3,000,000	3,000,000	-	0.0%
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,610,050**	**1,633,868**	**9.6%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	8,366,438	12,717,660	12,105,390	13,787,841	1,682,451	13.9%
Impact Fees Fund	52,555	73,382	89,689	96,676	6,987	7.8%
Community Development	5,796,083	5,145,153	4,781,103	165,533	(4,615,570)	-96.5%
Affordable Housing Trust	-	-	-	4,560,000	4,560,000	N/A
Historic Preservation	13,650	-	-	-	-	N/A
Land Development	(38)	251	-	-	-	N/A
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,610,050**	**1,633,868**	**9.6%**

CITY OF SANTA FE
POLICE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Police Administration	16,998,485	16,018,403	16,292,637	20,641,585	4,348,948	26.7%
Police Operations	22,776,915	25,620,798	25,820,842	27,190,083	1,369,241	5.3%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	25,612,137	28,966,505	29,652,902	31,900,978	2,248,076	7.6%
Contractuals & Utilities	963,171	1,352,584	1,652,589	2,341,377	688,788	41.7%
Repairs & Maintenance	136,043	185,789	199,571	211,652	12,081	6.1%
Supplies	948,770	992,809	1,048,408	1,169,339	120,931	11.5%
Insurance	1,166,076	1,528,482	1,804,304	1,871,425	67,121	3.7%
Other Operating Costs	6,220,180	5,192,392	6,232,342	8,208,202	1,975,860	31.7%
Capital Purchases	4,729,022	3,420,641	1,523,363	2,128,695	605,332	39.7%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	34,491,909	36,470,397	36,813,085	40,028,902	3,215,817	8.7%
Animal Services	64,883	1,001	4,705	5,000	295	6.3%
Law Enforcement	5,218,608	5,167,803	5,295,689	7,797,766	2,502,077	47.2%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

CITY OF SANTA FE
PUBLIC UTILITIES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Public Utilities Administration	3,439,284	2,186,009	4,093,704	3,579,549	(514,155)	-12.6%
Conservation & Sustainability	1,683,306	2,996,761	1,863,966	2,461,222	597,256	32.0%
Environmental Services	16,374,733	16,404,095	24,796,557	25,088,574	292,017	1.2%
Utility Customer Service	5,209,828	5,570,280	9,386,993	8,499,202	(887,791)	-9.5%
Wastewater Management	15,020,899	19,010,286	22,709,242	19,143,241	(3,566,001)	-15.7%
Water Operations	33,072,862	28,764,046	37,866,802	41,668,518	3,801,716	10.0%
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,440,306**	**(276,958)**	**-0.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	18,419,827	20,857,558	25,224,532	27,312,171	2,087,639	8.3%
Contractuals & Utilities	11,803,762	14,713,448	21,043,173	23,094,615	2,051,442	9.7%
Repairs & Maintenance	3,275,335	4,440,282	5,502,600	2,751,197	(2,751,403)	-50.0%
Supplies	2,494,884	2,702,179	4,476,977	4,279,597	(197,380)	-4.4%
Insurance	1,915,740	1,321,683	1,387,124	2,110,781	723,657	52.2%
Other Operating Costs	26,688,716	19,094,961	19,075,526	18,304,237	(771,289)	-4.0%
Capital Purchases	(16,076)	1,747,318	4,996,700	4,517,500	(479,200)	-9.6%
Debt Service	2,541,386	2,533,711	5,584,253	5,584,408	155	0.0%
Transfers to Other Funds	7,677,338	7,520,336	13,426,379	12,485,800	(940,579)	-7.0%
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,440,306**	**(276,958)**	**-0.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Resource Conservation	957,664	1,028,544	1,576,663	1,051,263	(525,400)	-33.3%
Community Development	21,411	10,132	-	-	-	N/A
Waste Water Management	15,020,899	19,010,286	22,709,242	19,143,241	(3,566,001)	-15.7%
Water Management	34,734,757	31,750,675	39,730,768	41,668,518	1,937,750	4.9%
Environmental Services	16,369,733	16,404,095	24,271,157	25,088,574	817,417	3.4%
Utilities Administration	7,696,448	6,727,744	12,429,434	11,027,488	(1,401,946)	-11.3%
Conservation & Sustainability	-	-	-	2,461,222	2,461,222	N/A
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,440,306**	**(276,958)**	**-0.3%**

CITY OF SANTA FE
PUBLIC WORKS DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Public Works Administration	1,200,030	1,145,485	1,425,488	1,927,735	502,247	35.2%
Facilities Maintenance	12,260,213	20,222,466	15,254,797	19,187,457	3,932,660	25.8%
Metropolitan Planning Organization	434,664	654,398	550,173	555,716	5,543	1.0%
Municipal Recreation Complex	5,051,856	3,723,000	7,843,879	8,391,096	547,217	7.0%
Parking Division	5,541,877	5,594,102	5,996,713	6,363,772	367,059	6.1%
Parks Division	13,918,361	21,194,725	16,247,453	17,846,418	1,598,965	9.8%
Complete Streets Division	18,806,207	19,205,380	11,896,032	12,055,919	159,887	1.3%
Transit	9,573,051	11,842,458	12,529,528	14,214,186	1,684,658	13.4%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,542,299**	**8,798,236**	**12.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	21,808,242	25,366,671	27,510,356	31,698,795	4,188,439	15.2%
Contractuals & Utilities	12,433,174	12,206,210	16,264,303	15,853,300	(411,003)	-2.5%
Repairs & Maintenance	2,581,244	2,043,705	3,480,555	3,894,447	413,892	11.9%
Supplies	2,227,847	2,111,226	2,346,667	2,342,596	(4,071)	-0.2%
Insurance	2,315,341	2,022,576	2,166,614	2,025,985	(140,629)	-6.5%
Other Operating Costs	9,130,701	9,620,708	5,629,004	7,279,571	1,650,567	29.3%
Capital Purchases	5,096,536	6,714,553	4,136,032	4,826,640	690,608	16.7%
Debt Service	1,162,381	1,229,231	4,479,000	3,200,447	(1,278,553)	-28.5%
Transfers to Other Funds	10,030,792	22,267,134	5,731,532	9,420,518	3,688,986	64.4%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,542,299**	**8,798,236**	**12.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	28,985,909	37,040,272	30,230,696	34,019,021	3,788,325	12.5%
Resource Conservation	168,117	181,508	185,517	-	(185,517)	-100.0%
City Drainage Fund	1,089,736	2,244,125	3,316,540	3,591,329	274,789	8.3%
Impact Fees Fund	2,106,152	1,938,504	-	-	-	N/A
Transportation Grants	501,535	727,456	679,552	1,125,307	445,755	65.6%
Community Development	1,117,260	226,407	-	-	-	N/A
Plaza Use Fund	43,914	126,352	35,500	35,500	-	0.0%
Public Facilities Fund	145,696	-	-	-	-	N/A
Quality of Life	95,696	283,425	251,650	252,650	1,000	0.4%
Streets & Roadways	2,730,650	2,373,138	1,762,470	1,843,090	80,620	4.6%
1/2% GRT Income Fund	4,798,712	11,469,661	4,403,702	7,194,207	2,790,505	63.4%
Railyard Properties	1,397,210	1,201,157	2,787,346	1,993,833	(793,513)	-28.5%
Midtown Campus	4,784,087	4,683,508	4,773,939	5,262,197	488,258	10.2%
Municipal Recreation Complex	3,773,528	3,723,000	4,920,289	5,216,798	296,509	6.0%
Parking	5,541,877	5,594,102	5,996,713	6,363,772	367,059	6.1%
Transit Bus System	9,506,181	11,769,399	12,400,149	13,644,595	1,244,446	10.0%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,542,299**	**8,798,236**	**12.3%**

CITY OF SANTA FE
REGIONAL AIRPORT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	2,614,327	3,574,688	3,772,121	3,778,552	6,431	0.2%
Contractuals & Utilities	1,064,107	337,580	153,700	189,200	35,500	23.1%
Repairs & Maintenance	215,757	268,193	206,000	927,500	721,500	350.2%
Supplies	272,939	659,583	326,000	475,000	149,000	45.7%
Insurance	83,447	139,942	153,021	181,320	28,299	18.5%
Other Operating Costs	2,013,693	2,977,945	701,055	1,032,460	331,405	47.3%
Capital Purchases	80,069	96,340	70,000	1,155,000	1,085,000	1550.0%
Transfers to Other Funds	-	20,634	-	-	-	N/A
TOTAL REGIONAL AIRPORT	**6,344,339**	**8,074,904**	**5,381,897**	**7,739,032**	**2,357,135**	**43.8%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Airport Fund	6,344,339	8,074,904	5,381,897	7,739,032	2,357,135	43.8%
TOTAL REGIONAL AIRPORT	**6,344,339**	**8,074,904**	**5,381,897**	**7,739,032**	**2,357,135**	**43.8%**

CITY OF SANTA FE
TOURISM SANTA FE - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Santa Fe Civic Center	5,919,304	7,321,648	8,605,275	9,368,057	762,782	8.9%
Visitors Bureau	5,807,609	7,261,247	7,663,875	8,910,731	1,246,856	16.3%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	3,386,663	3,986,931	4,136,679	4,340,017	203,338	4.9%
Contractuals & Utilities	1,295,969	2,153,482	2,241,100	2,618,700	377,600	16.8%
Repairs & Maintenance	136,189	132,177	186,000	198,040	12,040	6.5%
Supplies	220,193	216,412	224,950	873,482	648,532	288.3%
Insurance	137,973	171,541	164,531	168,743	4,212	2.6%
Other Operating Costs	5,981,009	7,224,868	6,049,807	7,564,669	1,514,862	25.0%
Capital Purchases	65,843	119,033	1,350,000	595,000	(755,000)	-55.9%
Debt Service	450,787	396,625	1,758,386	1,761,148	2,762	0.2%
Transfers to Other Funds	52,286	181,826	157,697	158,989	1,292	0.8%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Lodgers' Tax Fund	5,807,609	7,261,247	7,663,875	8,910,731	1,246,856	16.3%
Santa Fe Convention Center	5,919,304	7,321,648	8,605,275	9,368,057	762,782	8.9%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

FIR No. 10758

FISCAL IMPACT REPORT

General Information:

(Check) **Bill:** _____ **Resolution:** X

Short Title(s): Adopting the City of Santa Fe's Fiscal Year 2026-2027 Operating Budget

Sponsor(s): Mayor Michael J. Garcia

Reviewing Department(s): Finance Department

Staff Completing FIR: Andy Hopkins, Budget Officer **Date:** May 6, 2026 **Phone:** (505) 490-7228

Reviewed by City Attorney: _____ **Date:** _____

Reviewed by Finance Director: ANDREA PHILLIPS (May 8, 2026 14:55:07 MDT) **Date:** 05/08/2026

Summary:
This Resolution would adopt the Fiscal Year 2026-2027 ("FY27") operating budget ("Budget") for the City of Santa Fe; detail on the Budget is provided in the Proposed FY27 Budget book, included with this Resolution.

Departments Affected:
All City Departments

Consequences of Not Enacting Legislation:
If this legislation is not adopted, the City will not be in compliance with state law, which requires the City "to furnish and file with the [local government] division [of the department of finance and administration], on or before June 1 of each year, a proposed budget for the next fiscal year;" NMSA 1978 § 6-6-2. The absence of a budget would likely render the City ineligible to receive funding from the State and may hamper the City's ability to expend money as well.

Conflict, Duplication, Companionship, or Relationship to Other Legislation:
N/A

Performance and Administrative Implications:
The FY27 Budget sets a fiscally sustainable course for the City, while making investments to deliver exceptional services for Santa Fe.

Fiscal Implications:
The recommended FY27 All Funds operating expenditure budget of $521,144,821 is detailed in the Proposed FY27 Budget book included with this Resolution, and in the tables shown below.

Fiscal Impact

_____ Check here if no fiscal impact

Expenditures

Expenditure Type	FYE 2026	FYE 2027	FYE 2028	Require BAR (Y/N)	Recurring (R) or Non-recurring (NR)	Fund	3-Year Total Cost
Personnel Services	$ 0	$183,560,816	$ 0	N	R & NR	various	$183,560,816
Operating Expenses	$ 0	$221,494,390	$ 0	N	R & NR	various	$221,494,390
Capital Outlay	$ 0	$ 16,171,433	$ 0	N	R & NR	various	$ 16,171,433
Debt Service	$ 0	$ 21,158,722	$ 0	N	R & NR	various	$ 21,158,722
Transfers Out	$ 0	$ 78,759,460	$ 0	N	R & NR	various	$ 78,759,460
Total:	$ 0	$521,144,821	$ 0				$521,144,821

Expenditure Narrative:

The FY27 proposed budget meets the City's financial obligations, including pledged debt service and other operating costs, and leverages the City's resources into shared goals. The proposed FY27 all funds expenditures budget of $521,144,821 reflects an increase of $40,555,429, or 8.4%, when compared to Fiscal Year 2025-2026 ("FY26") original budgeted levels.

Revenue

Revenue Type	FYE 2026	FYE 2027	FYE 2028	Recurring (R) or Non-recurring (NR)	Fund
Taxes	$ 0	$219,704,776	$ 0	R	various
Licenses & Permits	$ 0	$ 4,628,953	$ 0	R	various
Fees/Service Charges	$ 0	$169,571,975	$ 0	R	various
Fines & Forfeitures	$ 0	$ 695,103	$ 0	R	various
Miscellaneous	$ 0	$ 10,982,372	$ 0	R	various
Intergovernmental	$ 0	$ 15,492,357	$ 0	R	various
Interest Earnings	$ 0	$ 12,820,647	$ 0	R	various
Transfers In	$ 0	$ 79,070,300	$ 0	R	various
Total	$ 0	$512,966,483	$ 0	R	various

Revenue Narrative:

The proposed FY27 all funds revenue budget of $512,966,483 reflects an increase of $31,443,857, or 6.5%, when compared to FY26 original budgeted levels.

Signature:

Email: bjmoya@santafenm.gov

Date: May 21, 2026

To: Governing Body

From: Andrea Phillips, Interim Finance Director AP ANDREA PHILLIPS
Andy Hopkins, Budget Officer AJH

Via: Brian Moya, Interim City Manager BM BM

RE: FY2026-2027 Budget – Finance Committee Action, Amendment A

EXECUTIVE SUMMARY:

The Finance Department requests an amendment to the FY2026-2027 (FY27) Annual Operating Budget.

ITEM AND ISSUE:

In the course of the City Council's review of the proposed FY27 budget, two errors were discovered:

1. Due to ambiguous wording in the original memo from the Affordable Housing Division of the Planning & Land Use Department requesting the addition of Project Manager positions, two positions were approved for addition to the proposed FY27 budget, but only one position was budgeted. The request also incorporated a request for equipment for the position(s), including a computer, software and mobile phone, which would be purchased by the Information Technology and Telecommunications (ITT) Department and charged to the Affordable Housing Division via the Services of Other Departments account. When staff discovered the error, staff determined that not only did the second position need to be budgeted, the requested list of equipment would have to be increased as well in order to provide the necessary equipment for the second position. The correction of this error would require changes to the proposed FY27 budget for the Affordable Housing Division, ITT Department, and the Finance Department, as detailed in the proposed Amendment A to the FY27 Annual Operating Budget Resolution which is attached to this memo.

City Council

Alma G. Castro, District 1 | Elizabeth "Liz" Barrett, District 2 | Lee Garcia, Mayor Pro Tem, District 3 | Jamie Cassutt, District 4
Patricia Feghali, District 1 | Paul C. Bustamante, District 2 | Pilar F.H. Faulkner, District 3 | Amanda Chavez, District 4

2. Upon review of the proposed FY27 budget for the Public Works Department, staff discovered that part of the debt service budget was inadvertently omitted from the proposed FY27 budget. Specifically, the debt service payable for the LED Streetlights and Citywide Solarization Projects was entered incorrectly in both the Public Works and the Public Utilities Departments. The correction for this error would result in changes to the proposed FY27 budget for both of these Departments, as detailed in the proposed Amendment A to the FY27 Annual Operating Budget Resolution, which is attached to this memo.

Both of the changes summarized above are fully funded within existing City resources and require no additional revenues in any funds in order to implement.

The amendment would result in an increase to the proposed FY27 All Funds Expenditures budget of $513,069, thereby increasing All Funds Expenditures budget from $521,144,821 to $521,657,890. The amendment would also result in an increase to the proposed FY27 All Funds Revenue budget of $153,634, thereby increasing the All-Funds Revenue budget from $512,966,483 to $513,120,117.

The amendment would result in an increase to the proposed FY27 General Fund expenditures budget of $146,231, thereby increasing the General Fund expenditures budget from $176,554,450 to $176,700,681. The amendment would also result in an increase to the proposed FY27 General Fund revenue budget of $146,231, thereby increasing the General Fund revenue budget from $176,554,450 to $176,700,681.

Changes to individual lines in the proposed FY27 budget are detailed in Amendment A, attached to this memo.

ACTION REQUESTED:

The Finance Department requests approval of Amendment A to the FY27 Annual Operating Budget.

ATTACHMENT:

Amendment A

CITY OF SANTA FE, NEW MEXICO
PROPOSED AMENDMENT(S) TO RESOLUTION NO. 2026-__
Fiscal Year 2027 Budget Resolution

Mayor and Members of the City Council:

In relation to Resolution No. 2026-__:

A RESOLUTION
ADOPTING THE CITY OF SANTA FE'S FISCAL YEAR 2026/2027 OPERATING BUDGET FOR THE CITY OF SANTA FE.

I intend to propose the following amendment(s)

1. ***Replace*** Exhibit A with the attached Exhibit A in its entirety.

The attached Exhibit A includes the following amendments to the exhibit as introduced on May 13, 2026:

a. ***Remove*** pages 4, 8, 10, and 11 (Proposed Fiscal Year 2027 Budget Pie Charts and Position Chart Tables).
b. "ALL FUNDS – REVENUES BY CATEGORY", "Fees & Service Charges", "Reimbursed Expenses", ***increase*** $34,510,057 to $34,517,460.
c. "ALL FUNDS – REVENUES BY CATEGORY", ***increase*** "Subtotal - Fees & Services", from $169,571,975 to $169,579,378.
d. "ALL FUNDS – REVENUES BY CATEGORY", "Transfers In", ***increase*** $79,070,300 to $79,216,531.
e. "ALL FUNDS – REVENUES BY CATEGORY", "TOTAL REVENUES, ***increase*** $512,966,483 to $513,120,117.
f. "ALL FUNDS – REVENUES BY CATEGORY", "Personnel Services", "Salaries", ***increase*** $125,113,223 to $125,205,742.
g. "ALL FUNDS – REVENUES BY CATEGORY", "Personnel Services", "Benefits", ***increase*** $58,447,593 to $58,493,902.
h. "ALL FUNDS – REVENUES BY CATEGORY", "Personnel Services", "Subtotal-Personnel Services", ***increase*** $183,560,816 to $183,699,644.
i. "ALL FUNDS – REVENUES BY CATEGORY", "Operating Expenses", "Utilities", ***increase*** $15,874,019 to $15,875,579.
j. "ALL FUNDS – REVENUES BY CATEGORY", "Operating Expenses", "Supplies", ***increase*** $19,840,191 to $19,840,934.
k. "ALL FUNDS – REVENUES BY CATEGORY", "Operating Expenses", "Other Operating Costs", ***increase*** $61,628,532 to $61,641,035.
l. "ALL FUNDS – REVENUES BY CATEGORY", "Operating Expenses," "Subtotal of Operating Expenses" ***increase*** $221,494,390 to $221,509,196.
m. "ALL FUNDS – REVENUES BY CATEGORY", "Debt Service", "Principal", $14,580,555 increase to $14,767,123.
n. "ALL FUNDS – REVENUES BY CATEGORY", "Debt Service", "Interest", ***increase*** $6,578,167 to $6,604,803.
o. "ALL FUNDS – REVENUES BY CATEGORY", "Debt Service", "Subtotal – Debt Service" ***increase*** $21,158,722 to $21,371,926.

p. "ALL FUNDS – REVENUES BY CATEGORY", "Transfers Out", ***increase*** $78,759,460 to $78,905,691.
q. "ALL FUNDS – REVENUES BY CATEGORY", "TOTAL EXPENDITURES", ***increase*** $521,144,821 to $521,657,890.
r. "ALL FUNDS – EXPENDITURES BY DEPARTMENT", "Finance", ***increase*** $22,676,368 to $22,822,599.
s. "ALL FUNDS – EXPENDITURES BY DEPARTMENT", "Info. Tech. & Telecomm." ***increase*** $23,838,283 to $23,845,686.
t. "ALL FUNDS – EXPENDITURES BY DEPARTMENT", "DEPARTMENT", "Planning and Land Use", ***increase*** $18,610,050 to $18,756,281.
u. "ALL FUNDS – EXPENDITURES BY DEPARTMENT", "DEPARTMENT", "Public Utilities", ***increase*** $100,440,306 to $100,463,840.
v. "ALL FUNDS – EXPENDITURES BY DEPARTMENT" "Public Works", ***increase*** $80,542,299 to $80,731,969.
w. "ALL FUNDS – EXPENDITURES BY DEPARTMENT", "TOTAL EXPENDITURES" ***increase*** $521,144,821 to $521,657,890.
x. "GENERAL FUND – REVENUES BY CATEGORY", "Transfers In" ***increase*** $19,470,009 to $19,616,240.
y. "GENERAL FUND – REVENUES BY CATEGORY", "TOTAL REVENUES", ***increase*** $176,554,450 to $176,700,681.
z. "GENERAL FUND – EXPENDITURES BY CATEGORY", "Personnel Services", "Salaries", ***increase*** $74,453,675 to $74,546,194.
aa. "GENERAL FUND – EXPENDITURES BY CATEGORY", "Benefits", ***increase*** $34,015,845 to $34,062,154.
bb. "GENERAL FUND – EXPENDITURES BY CATEGORY", "Subtotal - Personnel Services", ***increase*** $108,469,520 to $108,608,348.
cc. "GENERAL FUND – EXPENDITURES BY CATEGORY", "Operating Expenses", "Other Operating Costs", ***increase*** $19,805,494 to $19,812,897.
dd. "GENERAL FUND – EXPENDITURES BY CATEGORY", "Operating Expenses", "Subtotal - Operating Expenses", ***increase*** $47,666,477 to $47,673,880.
ee. "GENERAL FUND – EXPENDITURES BY CATEGORY", "TOTAL EXPENDITURES" ***increase*** $176,554,450 to $176,700,681.
ff. "GENERAL FUND – EXPENDITURES BY DEPARTMENT", "Planning and Land Use", ***increase*** $13,787,841 to $13,934,072.
gg. "GENERAL FUND – EXPENDITURES BY DEPARTMENT", "TOTAL GENERAL FUND", ***increase*** $176,554,450 to $176,700,681.
hh. "FINANCE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", "Budget", ***increase*** $12,484,831 to $12,631,062.
ii. "FINANCE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", "TOTAL FINANCE DEPARTMENT", ***increase*** $22,676,368 to $22,822,599.
jj. "FINANCE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "Transfers to other Funds", ***increase*** $11,492,511 to $11,638,742.
kk. "FINANCE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "TOTAL FINANCE DEPARTMENT", ***increase*** $22,676,368 to $22,822,599.
ll. "FINANCE DEPARTMENT – EXPENDITURES SUMMARY"," SUMMARY BY FUND", "½% GRT Income Fund", ***increase*** $11,689,168 to $11,835,399.

mm. "FINANCE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY FUND", "TOTAL FINANCE DEPARTMENT" ***increase***, $22,676,368 to $22,822,599.

nn. "INFORMATION TECHNOLOGY & TELECOMMUNICATIONS – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", "Enterprise Application Services", ***increase*** $4,961,402 to $4,962,145.

oo. "INFORMATION TECHNOLOGY & TELECOMMUNICATIONS – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", "Infrastructure Services", ***increase*** $13,629,690 to $13,636,350.

pp. "INFORMATION TECHNOLOGY & TELECOMMUNICATIONS – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", "TOTAL INFO. TECH. & TELECOMM.", ***increase*** $23,838,283 to $23,845,686.

qq. "INFORMATION TECHNOLOGY & TELECOMMUNICATIONS – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "Contractuals & Utilities", ***increase*** $7,327,265 to $7,328,825.

rr. "INFORMATION TECHNOLOGY & TELECOMMUNICATIONS – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "Supplies", ***increase*** $4,379,836 to $4,380,579.

ss. "INFORMATION TECHNOLOGY & TELECOMMUNICATIONS – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "Other Operating Costs", ***increase*** $4,093,982 to $4,099,082.

tt. "INFORMATION TECHNOLOGY & TELECOMMUNICATIONS – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "TOTAL INFO. TECH. & TELECOMM.", ***increase*** $23,838,283 to $23,845,686.

uu. "INFORMATION TECHNOLOGY & TELECOMMUNICATIONS – EXPENDITURES SUMMARY", "SUMMARY BY FUND", Services to Other Departments", ***increase*** $22,288,568 increase to $22,295,971.

vv. "INFORMATION TECHNOLOGY & TELECOMMUNICATIONS – EXPENDITURES SUMMARY", "SUMMARY BY FUND" "TOTAL INFO. TECH. & TELECOMM.", ***increase*** $23,838,283 to $23,845,686.

ww. "PLANNING & LAND USE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", "Affordable Housing" ***increase***, $8,775,829 to $8,922,060.

xx. "PLANNING & LAND USE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", TOTAL PLANNING & LAND USE", ***increase*** $18,610,050 to $18,756,281.

yy. "PLANNING & LAND USE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "Salaries, Wages & Benefits", ***increase*** $7,890,242 to $8,029,070.

zz. "PLANNING & LAND USE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "Other Operating Costs", ***increase*** $1,069,756 to $1,077,159.

aaa. "PLANNING & LAND USE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "TOTAL PLANNING & LAND USE", ***increase*** $18,610,050 to $18,756,281.

bbb. "PLANNING & LAND USE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY FUND", "General Fund", ***increase*** $13,787,841 to $13,934,072.

ccc. "PLANNING & LAND USE DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY FUND", "TOTAL PLANNING & LAND USE", ***increase*** $18,610,050 to $18,756,281.

ddd. "PUBLIC UTILITIES DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", "Public Utilities Administration", ***increase*** $3,579,549 to $3,603,083.

eee. "PUBLIC UTILITIES DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", "TOTAL PUBLIC UTILITIES", ***increase*** $100,440,306 to $100,463,840.

fff. "PUBLIC UTILITIES DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "Debt Service", ***increase*** $5,584,408 to $5,607,942.

ggg. "PUBLIC UTILITIES DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "TOTAL PUBLIC UTILITIES", ***increase*** $100,440,306to $100,463,840.

hhh. "PUBLIC UTILITIES DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY FUND", "Resource Conservation", ***increase*** $1,051,263 to $1,074,797.

iii. "PUBLIC UTILITIES DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY FUND", "TOTAL PUBLIC UTILITIES", ***increase*** $100,440,306 to $100,463,840.

jjj. "PUBLIC WORKS DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", "Complete Streets Division", ***increase*** $12,055,919 to $12,245,589.

kkk. "PUBLIC WORKS DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY DIVISION", "TOTAL PUBLIC WORKS", ***increase*** $80,542,299 increase to $80,731,969.

lll. "PUBLIC WORKS DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY CATEGORY", "Debt Service", ***increase*** $3,200,447 to $3,390,117.

mmm. "PUBLIC WORKS DEPARTMENT – EXPENDITURES SUMMARY "SUMMARY BY CATEGORY", "TOTAL PUBLIC WORKS", ***increase*** $80,542,299 to $80,731,969.

nnn. "PUBLIC WORKS DEPARTMENT – EXPENDITURES SUMMARY", "SUMMARY BY FUND", "Resource Conservation", ***increase*** "-" ($0) to $189,670.

ooo. "PUBLIC WORKS DEPARTMENT – EXPENDITURES SUMMARY", 'SUMMARY BY FUND", "TOTAL PUBLIC WORKS", ***increase*** $80,542,299 to $80,731,969.

This amendment WILL change the caption. _____

This amendment WILL NOT change the caption. _x____

Respectfully submitted,

Michael J. Garcia, Mayor

APPROVED AS TO FORM:

Marcos Martinez
Marcos Martinez (May 12, 2026 16:24 MST)

MARCOS D. MARTÍNEZ, CITY ATTORNEY

ADOPTED: _____
NOT ADOPTED: _____
DATE: _____

ATTEST:

_____
GERALYN F. CARDENAS, CITY CLERK

10758.1(A)

EXHIBIT A

PROPOSED FISCAL YEAR 2027 BUDGET

ALL FUNDS SUMMARY

CITY OF SANTA FE
ALL FUNDS - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Local/State-Shared Taxes:							
-Gross Receipts Tax	158,080,046	169,534,967	173,964,469	167,400,000	178,537,742	11,137,742	6.7%
-Property Tax	12,149,080	12,502,649	12,767,886	13,171,757	14,601,857	1,430,100	10.9%
-Franchise Fees	5,668,146	5,291,041	5,418,561	5,647,741	5,586,036	(61,705)	-1.1%
-Lodgers' Tax	19,948,448	16,229,165	17,923,699	18,000,001	18,128,020	128,019	0.7%
-Gasoline Tax	1,561,558	1,631,126	1,452,729	1,680,000	1,587,951	(92,049)	-5.5%
-Other Taxes	1,206,662	1,304,150	1,240,722	1,308,468	1,263,170	(45,298)	-3.5%
Subtotal - Taxes	*198,613,941*	*206,493,099*	*212,768,067*	*207,207,967*	*219,704,776*	*12,496,809*	*6.0%*
Licenses & Permits:							
-Business Licenses	912,765	758,008	751,396	816,300	691,827	(124,473)	-15.2%
-Building/Zoning Permits	3,945,947	4,790,704	4,214,670	3,155,000	3,755,000	600,000	19.0%
-Other Licenses & Permits	171,689	141,734	184,559	155,000	182,126	27,126	17.5%
Subtotal - Licenses & Permits	*5,030,400*	*5,690,446*	*5,150,625*	*4,126,300*	*4,628,953*	*502,653*	*12.2%*
Fees & Service Charges:							
-Airport Fees	2,051,120	2,156,373	3,446,571	5,002,630	6,378,000	1,375,370	27.5%
-Ambulance Fees	4,649,371	3,820,330	7,362,487	5,114,308	5,887,781	773,473	15.1%
-Civic Center Fees	629,296	416,855	785,551	583,000	895,000	312,000	53.5%
-Housing Fees	978,427	1,608,969	1,431,062	877,540	833,000	(44,540)	-5.1%
-Impact Fees	2,574,677	4,286,993	1,558,901	3,827,254	4,478,138	650,884	17.0%
-Insurance Premiums	27,542,821	32,828,591	34,095,408	32,798,891	35,145,184	2,346,293	7.2%
-Meals Fees	80,247	65,244	57,989	77,400	77,400	-	0.0%
-Parking Fees	3,918,405	4,843,050	4,883,143	5,150,500	5,450,000	299,500	5.8%
-Planning/Land Use Fees	449,523	165,009	1,162,565	694,500	540,200	(154,300)	-22.2%
-Police/Court Fees	626,617	592,138	904,166	474,392	561,403	87,011	18.3%
-Public Transportation Fees	229,089	238,753	219,315	235,500	249,630	14,130	6.0%
-Recreation Fees	2,204,704	3,096,693	3,702,744	3,357,349	3,403,150	45,801	1.4%
-Solid Waste Fees	15,473,829	16,147,451	16,685,357	16,550,529	15,514,942	(1,035,587)	-6.3%
-Wastewater Fees	18,476,058	15,154,599	15,004,927	13,993,545	14,061,673	68,128	0.5%
-Water Fees	35,764,431	43,710,877	38,642,717	37,727,253	37,870,396	143,143	0.4%
-Reimbursed Expenses	14,880,751	21,359,460	22,944,169	23,694,431	34,517,460	10,823,029	45.7%
-Other Fees/Services	755,503	3,587,030	3,968,337	3,918,896	3,716,021	(202,875)	-5.2%
Subtotal - Fees & Services	*131,284,868*	*154,078,417*	*156,855,409*	*154,077,918*	*169,579,378*	*15,501,460*	*10.1%*
Fines & Forfeitures:							
-Parking Fines	533,465	460,469	448,621	525,000	525,000	-	0.0%
-Violations Fines	16,271	16,647	10,779	16,653	16,653	-	0.0%
-Other Fines & Forfeitures	190,220	155,698	120,448	153,750	153,450	(300)	-0.2%
Subtotal - Fines & Forfeitures	*739,956*	*632,815*	*579,848*	*695,403*	*695,103*	*(300)*	*0.0%*

[Continued next page]

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
ALL FUNDS - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
[Revenues by Category - continued]							
Rents/Royalties/Concessions:							
-Airport Rentals	(5,599)	(112,796)	68,959	170,000	400,600	230,600	135.6%
-Equipment Rentals	34,269	25,553	21,653	27,000	27,000	-	0.0%
-Parks & Recreation - Rentals	283,510	295,116	250,831	302,750	302,750	-	0.0%
-Other Rentals	2,435,262	3,018,972	2,152,001	3,753,635	3,185,608	(568,027)	-15.1%
Subtotal - Rents/Royalties	*2,747,441*	*3,226,844*	*2,493,443*	*4,253,385*	*3,915,958*	*(337,427)*	*-7.9%*
Miscellaneous Revenues:							
-Insurance Recoveries	6,971	96,659	-	100,000	100,000	-	0.0%
-Sales Revenue	698,130	1,090,468	1,426,691	1,322,024	112,840	(1,209,184)	-91.5%
-Other Misc. Revenue	4,138,531	2,309,196	(1,461,974)	4,959,688	6,853,574	1,893,886	38.2%
Subtotal - Miscellaneous	*4,843,631*	*3,496,323*	*(35,282)*	*6,381,712*	*7,066,414*	*684,702*	*10.7%*
Intergovernmental Grants:							
-State Grants	4,675,031	4,668,053	8,944,961	5,479,143	6,427,469	948,326	17.3%
-Federal Grants	4,216,318	8,878,828	11,340,342	4,312,383	7,170,773	2,858,390	66.3%
-SF County Grants	(12,144)	70,487	478,364	244,698	252,092	7,394	3.0%
-Other Grants	10,000	20,000	228,223	-	1,642,023	1,642,023	N/A
Subtotal - Intergovernmental	*8,889,205*	*13,637,368*	*20,991,891*	*10,036,224*	*15,492,357*	*5,456,133*	*54.4%*
Interest on Investments	1,880,058	11,977,762	15,608,940	14,965,784	12,820,647	(2,145,137)	-14.3%
Transfers In	54,330,427	68,494,322	86,446,134	79,777,933	79,216,531	(561,402)	-0.7%
TOTAL REVENUES	**408,359,928**	**467,727,396**	**500,859,075**	**481,522,626**	**513,120,117**	**31,597,491**	**6.6%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
ALL FUNDS - EXPENDITURES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Personnel Services:							
-Salaries	87,006,557	94,031,822	104,388,361	114,831,571	125,205,742	10,374,171	9.0%
-Benefits	25,923,600	42,861,499	49,165,065	55,459,448	58,493,902	3,034,454	5.5%
Subtotal - Personnel Services	*112,930,157*	*136,893,321*	*153,553,426*	*170,291,019*	*183,699,644*	*13,408,625*	*7.9%*
Operating Expenses:							
-Contractual Services	33,117,885	39,728,204	42,813,653	49,028,138	62,021,020	12,992,882	26.5%
-Utilities	14,259,390	14,607,707	14,642,568	16,763,777	15,875,579	(888,198)	-5.3%
-Repairs & Maintenance	7,213,214	6,973,357	7,896,216	10,321,906	8,932,045	(1,389,861)	-13.5%
-Supplies	12,229,321	12,434,704	13,979,996	15,718,939	19,840,934	4,121,995	26.2%
-Insurance	31,911,781	38,610,663	40,520,644	47,887,157	50,834,531	2,947,374	6.2%
-Travel/Training	1,075,678	1,185,636	1,448,718	1,854,329	2,364,052	509,723	27.5%
-Other Operating Costs	54,112,499	63,364,261	62,938,270	51,633,782	61,641,035	10,007,253	19.4%
Subtotal - Operating Expenses	*153,919,768*	*176,904,532*	*184,240,065*	*193,208,028*	*221,509,196*	*28,301,168*	*14.6%*
Capital Outlay:							
-Capital Purchases	159,528	9,550,555	11,431,827	10,890,068	12,581,740	1,691,672	15.5%
-Land & Building	960,535	3,456,527	5,686,821	3,306,443	3,589,693	283,250	8.6%
Subtotal - Capital Outlay	*1,120,062*	*13,007,082*	*17,118,648*	*14,196,511*	*16,171,433*	*1,974,922*	*13.9%*
Debt Service:							
-Principal	8,250,699	8,916,053	9,221,175	16,476,768	14,767,123	(1,709,645)	-10.4%
-Interest	8,179,800	7,412,736	6,735,646	6,084,329	6,604,803	520,474	8.6%
-Other Debt Service	(970,457)	(825,913)	(680,358)	-	-	-	N/A
Subtotal - Debt Service	*15,460,042*	*15,502,877*	*15,276,463*	*22,561,097*	*21,371,926*	*(1,189,171)*	*-5.3%*
Transfers Out	63,855,814	83,144,147	111,814,252	80,332,737	78,905,691	(1,427,046)	-1.8%
TOTAL EXPENDITURES	**347,285,844**	**425,451,958**	**482,002,854**	**480,589,392**	**521,657,890**	**41,068,498**	**8.5%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
ALL FUNDS - EXPENDITURES BY DEPARTMENT
FY 2022/23 THROUGH FY 2026/27

DEPARTMENT	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Community Engagement	2,468,480	2,796,069	2,716,823	3,827,614	3,645,850	(181,764)	-4.7%
Community Services	25,811,343	33,840,445	42,646,397	40,308,146	42,874,349	2,566,203	6.4%
Economic Development	5,924,665	7,569,183	11,536,605	7,984,187	8,952,581	968,394	12.1%
Emergency Management	430,590	542,307	560,952	948,098	1,103,460	155,362	16.4%
Finance	25,294,836	29,116,965	32,688,516	26,326,485	22,822,599	(3,503,886)	-13.3%
Fire	25,639,372	30,823,543	39,409,906	35,903,389	40,963,356	5,059,967	14.1%
General Government	14,972,717	15,942,012	16,678,851	21,217,755	24,467,977	3,250,222	15.3%
Human Resources	27,425,845	28,000,468	27,945,254	32,349,993	33,784,182	1,434,189	4.4%
Info. Tech. & Telecomm.	11,430,812	15,506,239	18,741,662	15,019,557	23,845,686	8,826,129	58.8%
Metropolitan Redevelopment Agency	-	98,838	571,648	594,555	674,847	80,292	13.5%
Planning & Land Use	17,007,036	14,228,688	17,936,446	16,976,182	18,756,281	1,780,099	10.5%
Police	28,940,437	39,775,400	41,639,201	42,113,479	47,831,668	5,718,189	13.6%
Public Utilities	65,344,464	74,800,912	74,931,476	100,717,264	100,463,840	(253,424)	-0.3%
Public Works	50,087,150	66,786,259	83,582,014	71,744,063	80,731,969	8,987,906	12.5%
Regional Airport	3,123,353	6,344,339	8,074,904	5,381,897	7,739,032	2,357,135	43.8%
TOURISM Santa Fe	10,054,083	11,726,913	14,582,895	16,269,150	18,278,788	2,009,638	12.4%
*Non-Departmental**	*33,330,661*	*47,553,380*	*47,759,306*	*42,907,578*	*44,721,425*	1,813,847	4.2%
TOTAL EXPENDITURES	**347,285,844**	**425,451,958**	**482,002,854**	**480,589,392**	**521,657,890**	**41,068,498**	**8.5%**

**excludes Buckman Direct Diversion and SF Solid Waste Management Agency*

PROPOSED FISCAL YEAR 2027 BUDGET

GENERAL FUND SUMMARY

CITY OF SANTA FE
GENERAL FUND - REVENUES BY CATEGORY
FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL REVENUE FY 2022/23	ACTUAL REVENUE FY 2023/24	ACTUAL REVENUE FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Local/State-Shared Taxes:							
-Gross Receipts Tax	98,962,863	106,133,722	108,907,004	104,797,172	111,103,376	6,306,204	6.0%
-Property Tax	9,516,085	10,270,979	10,811,408	11,197,436	11,499,013	301,577	2.7%
-Franchise Fees	5,607,490	5,236,545	5,366,831	5,580,741	5,586,036	5,295	0.1%
-Other Taxes	1,206,662	1,304,150	1,240,722	1,308,468	1,263,170	(45,298)	-3.5%
Subtotal - Taxes	*115,293,100*	*122,945,396*	*126,325,966*	*122,883,817*	*129,451,595*	*6,567,778*	*5.3%*
Licenses & Permits:							
-Business Licenses	912,765	758,008	751,396	816,300	691,827	(124,473)	-15.2%
-Building/Zoning Permits	3,945,937	4,790,704	4,214,670	3,155,000	3,755,000	600,000	19.0%
-Other Licenses & Permits	164,389	133,984	177,529	138,000	165,126	27,126	19.7%
Subtotal - Licenses & Permits	*5,023,090*	*5,682,696*	*5,143,595*	*4,109,300*	*4,611,953*	*502,653*	*12.2%*
Fees & Service Charges:							
-Ambulance Fees	4,649,371	3,820,330	7,362,487	5,114,308	5,887,781	773,473	15.1%
-Impact Fees	2,800	-	-	3,000	3,000	-	0.0%
-Planning/Land Use Fees	299,523	315,009	1,162,565	694,500	540,200	(154,300)	-22.2%
-Police/Court Fees	32,531	24,098	259,247	30,989	20,000	(10,989)	-35.5%
-Recreation Fees	296,206	329,153	337,588	315,350	315,350	-	0.0%
-Reimbursed Expenses	5,427,430	6,761,864	6,807,486	8,807,129	9,691,459	884,330	10.0%
-Other Fees/Services	80,058	82,722	108,105	303,500	167,905	(135,595)	-44.7%
Subtotal - Fees & Services	*10,787,919*	*11,333,176*	*16,037,479*	*15,268,776*	*16,625,695*	*1,356,919*	*8.9%*
Fines & Forfeitures:							
-Violations Fines	9,413	494	459	500	500	-	0.0%
-Other Fines & Forfeitures	137,443	98,942	73,799	103,600	103,600	-	0.0%
Subtotal - Fines & Forfeitures	*146,856*	*99,436*	*74,258*	*104,100*	*104,100*	-	*0.0%*
Rents/Royalties/Concessions:							
-Parks & Recreation - Rentals	24,263	17,310	10,292	19,750	19,750	-	0.0%
-Other Rentals	803	8,581	10,100	8,600	8,600	-	0.0%
Subtotal - Rents/Royalties	*25,066*	*25,890*	*20,392*	*28,350*	*28,350*	-	*0.0%*
Miscellaneous Revenues:							
-Sales Revenue	72,308	85,808	10,478	1,000,000	-	(1,000,000)	-100.0%
-Other Misc. Revenue	(1,821,191)	(578,593)	(3,764,505)	128,558	3,441,949	3,313,391	2577.4%
Subtotal - Miscellaneous	*(1,748,883)*	*(492,785)*	*(3,754,027)*	*1,128,558*	*3,441,949*	*2,313,391*	*205.0%*
Intergovernmental Grants:							
-State Grants	-	-	-	-	50,000	50,000	N/A
Subtotal - Intergovernmental	-	-	-	-	*50,000*	*50,000*	*N/A*
Interest on Investments	1,517,465	697,729	3,474,654	3,134,105	2,770,799	(363,306)	-11.6%
Transfers In	3,104,936	3,545,419	5,831,753	14,394,600	19,616,240	5,221,640	36.3%
TOTAL REVENUES	**134,149,549**	**143,836,957**	**153,154,069**	**161,051,606**	**176,700,681**	**15,649,075**	**9.7%**

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE

GENERAL FUND - EXPENDITURES BY CATEGORY

FY 2022/23 THROUGH FY 2026/27

CATEGORY	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Personnel Services:							
-Salaries	53,481,064	57,605,727	63,694,974	68,557,010	74,546,194	5,989,184	8.7%
-Benefits	25,151,714	27,733,949	30,783,006	32,351,761	34,062,154	1,710,393	5.3%
Subtotal - Personnel Services	*78,632,778*	*85,339,676*	*94,477,981*	*100,908,771*	*108,608,348*	*7,699,577*	*7.6%*
Operating Expenses:							
-Contractual Services	8,683,766	10,093,712	10,488,005	11,666,496	13,051,527	1,385,031	11.9%
-Utilities	3,878,621	4,221,509	3,648,325	4,187,596	3,843,596	(344,000)	-8.2%
-Repairs & Maintenance	1,370,827	994,212	645,664	1,186,829	1,512,174	325,345	27.4%
-Supplies	3,400,538	3,818,559	3,973,239	3,865,042	4,106,706	241,664	6.3%
-Insurance	1,780,229	4,616,911	5,015,002	5,133,798	4,620,637	(513,161)	-10.0%
-Travel/Training	357,977	422,239	544,980	618,455	726,343	107,888	17.4%
-Other Operating Costs	9,329,024	13,632,507	15,296,978	12,674,557	19,812,897	7,138,340	56.3%
Subtotal - Operating Expenses	*28,800,982*	*37,799,649*	*39,612,193*	*39,332,773*	*47,673,880*	*8,341,107*	*21.2%*
Capital Outlay:							
-Capital Purchases	17,164	4,558,722	4,181,080	1,522,201	2,000,424	478,223	31.4%
-Land & Building	228,659	129,987	435,974	220,000	220,000	-	0.0%
Subtotal - Capital Outlay	*245,823*	*4,688,709*	*4,617,054*	*1,742,201*	*2,220,424*	*478,223*	*27.4%*
Transfers Out	11,627,855	12,741,913	35,253,226	19,067,861	18,198,029	(869,832)	-4.6%
TOTAL EXPENDITURES	**119,307,438**	**140,569,947**	**173,960,454**	**161,051,606**	**176,700,681**	**15,649,075**	**9.7%**

PROPOSED FISCAL YEAR 2027 BUDGET

CITY OF SANTA FE
GENERAL FUND EXPENDITURES BY DEPARTMENT
FY 2022/23 THROUGH FY 2026/27

DEPARTMENT	ACTUAL EXPENSES FY 2022/23	ACTUAL EXPENSES FY 2023/24	ACTUAL EXPENSES FY 2024/25	FY 2025/26 ORIGINAL BUDGET	PROPOSED BUDGET FY 2026/27	AMOUNT CHANGE 25/26-26/27	PERCENT CHANGE 25/26-26/27
Community Engagement	2,400,406	2,644,069	2,716,823	3,227,614	3,645,850	418,236	13.0%
Community Services	11,755,168	13,786,916	20,925,797	19,876,868	19,400,417	(476,451)	-2.4%
Economic Development	2,295,710	2,796,895	4,512,871	2,848,991	3,123,868	274,877	9.6%
Emergency Management	167,156	189,176	310,322	335,924	717,812	381,888	113.7%
Finance	6,959,811	8,776,466	8,695,902	8,751,208	8,825,022	73,814	0.8%
Fire	25,216,546	29,437,443	36,961,250	34,740,216	39,040,901	4,300,685	12.4%
General Government	5,557,789	6,696,573	7,273,455	8,173,823	9,640,867	1,467,044	17.9%
Human Resources	6,432,314	4,087,127	2,513,524	2,595,897	3,024,788	428,891	16.5%
Info. Tech. & Telecomm.	-	-	2,487,000	-	-	-	N/A
Planning & Land Use	9,943,714	8,366,438	12,717,660	12,105,390	13,934,072	1,828,682	15.1%
Police	26,759,108	34,491,909	36,470,397	36,813,085	40,028,902	3,215,817	8.7%
Public Works	20,562,355	28,985,909	37,040,272	30,230,696	34,019,021	3,788,325	12.5%
Non-Departmental	*1,257,362*	*311,026*	*1,335,179*	*1,351,894*	*1,299,161*	(52,733)	-3.9%
TOTAL GENERAL FUND	**119,307,438**	**140,569,947**	**173,960,454**	**161,051,606**	**176,700,681**	**15,649,075**	**9.7%**

CITY OF SANTA FE
COMMUNITY ENGAGEMENT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
City Clerk	1,307,582	1,235,156	2,219,430	1,710,894	(508,536)	-22.9%
Constituent Services	1,488,487	1,481,667	1,608,184	1,934,956	326,772	20.3%
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	1,640,182	1,721,159	2,235,713	2,506,242	270,529	12.1%
Contractuals & Utilities	312,521	430,383	432,965	410,567	(22,398)	-5.2%
Repairs & Maintenance	3,813	5,520	5,000	5,000	-	0.0%
Supplies	175,563	123,787	162,296	200,975	38,679	23.8%
Insurance	66,885	75,781	71,078	71,624	546	0.8%
Other Operating Costs	424,452	295,742	920,562	451,442	(469,120)	-51.0%
Capital Purchases	110,651	64,451	-	-	-	N/A
Transfers to Other Funds	62,000	-	-	-	-	N/A
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	2,644,069	2,716,823	3,227,614	3,645,850	418,236	13.0%
Franchise Fee Fund	62,000	-	-	-	-	N/A
Public Campaign Financing	90,000	-	600,000	-	(600,000)	-100.0%
TOTAL COMMUNITY ENGAGEMENT	**2,796,069**	**2,716,823**	**3,827,614**	**3,645,850**	**(181,764)**	**-4.7%**

CITY OF SANTA FE
COMMUNITY SERVICES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Community Services Administration	1,493,950	5,425,765	1,468,544	3,185,110	1,716,566	116.9%
Library	5,588,268	6,786,644	6,361,349	6,902,735	541,386	8.5%
Recreation	12,294,268	11,222,185	13,172,769	14,810,522	1,637,753	12.4%
Senior Services	6,615,371	8,613,160	9,353,907	10,127,452	773,545	8.3%
Youth & Family	7,848,588	10,598,643	9,951,577	7,848,530	(2,103,047)	-21.1%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	12,457,056	13,674,037	16,980,050	17,900,457	920,407	5.4%
Contractuals & Utilities	8,798,076	8,384,297	7,930,929	9,982,571	2,051,642	25.9%
Repairs & Maintenance	216,476	289,029	179,932	425,700	245,768	136.6%
Supplies	2,001,022	2,132,671	1,994,650	2,066,353	71,703	3.6%
Insurance	878,434	805,411	739,169	770,656	31,487	4.3%
Other Operating Costs	2,786,308	3,811,341	2,354,510	3,654,389	1,299,879	55.2%
Capital Purchases	624,376	1,443,043	167,011	348,656	181,645	108.8%
Transfers to Other Funds	6,078,697	12,106,569	9,961,895	7,725,567	(2,236,328)	-22.4%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	13,786,916	20,925,797	19,876,868	19,400,417	(476,451)	-2.4%
Law Enforcement	58,616	91,041	316,342	678,822	362,480	114.6%
Community Development	5,915,160	5,229,866	4,092,117	5,676,631	1,584,514	38.7%
Senior Citizen Grants/Programs	4,207,798	5,091,240	5,104,743	5,361,295	256,552	5.0%
Library	1,158,908	1,488,703	1,203,977	1,272,366	68,389	5.7%
Quality of Life	54,998	128,495	163,770	163,770	-	0.0%
Recreation Programs	3,350,247	3,960,010	4,683,100	4,860,884	177,784	3.8%
Special Recreation Leagues	4,548	2,846	5,800	5,800	-	0.0%
Genoveva Chavez Community Ctr.	5,303,254	5,728,400	4,861,429	5,454,364	592,935	12.2%
TOTAL COMMUNITY SERVICES	**33,840,445**	**42,646,397**	**40,308,146**	**42,874,349**	**2,566,203**	**6.4%**

CITY OF SANTA FE
DEPARTMENT OF ECONOMIC DEVELOPMENT & CREATIVE INDUSTRIES - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Arts & Culture	1,575,668	2,846,099	2,117,640	2,630,720	513,080	24.2%
Economic Development	5,993,515	8,121,528	5,361,592	5,792,366	430,774	8.0%
Santa Fe Film Office	-	568,978	504,955	529,495	24,540	4.9%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	1,670,299	1,853,561	2,482,896	2,691,734	208,838	8.4%
Contractuals & Utilities	2,648,404	3,370,622	1,477,204	1,617,187	139,983	9.5%
Repairs & Maintenance	1,569	8,261	4,000	3,700	(300)	-7.5%
Supplies	54,752	100,018	98,850	148,005	49,155	49.7%
Insurance	56,239	55,893	72,688	72,861	173	0.2%
Other Operating Costs	1,210,973	1,847,702	1,840,361	2,212,815	372,454	20.2%
Capital Purchases	-	85,773	-	-	-	N/A
Debt Service	-	5,000	-	-	-	N/A
Transfers to Other Funds	1,926,948	4,209,774	2,008,188	2,206,279	198,091	9.9%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	2,796,895	4,512,871	2,848,991	3,123,868	274,877	9.6%
Economic Development	2,551,568	2,844,857	2,412,107	2,547,412	135,305	5.6%
Lodgers' Tax Fund	1,534,296	2,713,181	1,990,938	2,486,998	496,060	24.9%
Community Development	645,052	763,800	100,494	121,086	20,592	20.5%
Santa Fe Film Office	-	568,978	504,955	529,495	24,540	4.9%
Santa Fe Convention Center	41,372	132,918	126,702	143,722	17,020	13.4%
TOTAL ECONOMIC DEVELOPMENT	**7,569,183**	**11,536,605**	**7,984,187**	**8,952,581**	**968,394**	**12.1%**

CITY OF SANTA FE
EMERGENCY MANAGEMENT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	229,189	293,242	273,538	323,881	50,343	18.4%
Contractuals & Utilities	98,352	7,892	243,021	16,495	(226,526)	-93.2%
Repairs & Maintenance	-	-	250	-	(250)	-100.0%
Supplies	103,340	37,425	217,351	246,601	29,250	13.5%
Insurance	7,327	8,071	6,604	9,183	2,579	39.1%
Other Operating Costs	75,253	119,907	131,176	431,142	299,966	228.7%
Capital Purchases	28,845	94,414	76,158	76,158	-	0.0%
TOTAL EMERGENCY MANAGEMENT	**542,307**	**560,952**	**948,098**	**1,103,460**	**155,362**	**16.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	189,176	310,322	335,924	717,812	381,888	113.7%
Emergency Services (grant funding)	258,037	227,958	612,174	385,648	(226,526)	-37.0%
Community Development	95,094	22,671	-	-	-	N/A
TOTAL EMERGENCY MANAGEMENT	**542,307**	**560,952**	**948,098**	**1,103,460**	**155,362**	**16.4%**

CITY OF SANTA FE
FINANCE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Finance Administration	1,278,975	1,312,151	1,601,441	1,893,305	291,864	18.2%
Accounting	5,383,862	3,706,177	3,097,808	2,903,443	(194,365)	-6.3%
Budget	18,200,890	23,404,980	16,387,733	12,631,062	(3,756,671)	-22.9%
Fleet Management	1,529,059	1,857,475	1,758,213	1,985,056	226,843	12.9%
Purchasing	1,639,225	963,654	1,031,152	1,203,888	172,736	16.8%
Treasury	1,084,953	1,444,078	2,450,138	2,205,845	(244,293)	-10.0%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,822,599**	**(3,503,886)**	**-13.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	4,840,314	5,962,505	6,960,781	7,009,061	48,280	0.7%
Contractuals & Utilities	4,107,679	2,109,544	2,482,700	2,015,000	(467,700)	-18.8%
Repairs & Maintenance	163,798	114,281	250,000	293,000	43,000	17.2%
Supplies	550,829	345,951	574,200	724,400	150,200	26.2%
Insurance	153,994	221,950	197,212	199,681	2,469	1.3%
Other Operating Costs	763,676	729,972	574,603	892,715	318,112	55.4%
Capital Purchases	12,292	85,914	20,000	50,000	30,000	150.0%
Transfers to Other Funds	18,524,383	23,118,399	15,266,989	11,638,742	(3,628,247)	-23.8%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,822,599**	**(3,503,886)**	**-13.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	8,776,466	8,695,902	8,751,208	8,825,022	73,814	0.8%
Capital Equipment Reserve	803,570	52,751	-	-	-	N/A
Lodgers' Tax Fund	93,455	137,562	352,734	177,122	(175,612)	-49.8%
Community Development	-	278	-	-	-	N/A
1/2% GRT Income Fund	17,914,415	22,244,547	15,464,330	11,835,399	(3,628,931)	-23.5%
Services to Other Depts	1,529,059	1,557,475	1,758,213	1,985,056	226,843	12.9%
TOTAL FINANCE DEPARTMENT	**29,116,965**	**32,688,516**	**26,326,485**	**22,822,599**	**(3,503,886)**	**-13.3%**

CITY OF SANTA FE
FIRE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Fire Administration	4,003,767	5,932,596	3,483,855	6,272,055	2,788,200	80.0%
Fire Operations	20,593,763	25,840,021	25,541,866	27,060,515	1,518,649	5.9%
Support Services	6,226,012	7,637,289	6,877,668	7,630,786	753,118	11.0%
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	25,028,156	28,364,702	29,464,690	30,419,854	955,164	3.2%
Contractuals & Utilities	524,845	539,487	768,885	2,298,318	1,529,433	198.9%
Repairs & Maintenance	140,854	189,036	127,674	154,284	26,610	20.8%
Supplies	1,812,582	1,887,770	1,655,951	2,314,995	659,044	39.8%
Insurance	710,451	876,512	776,875	762,956	(13,919)	-1.8%
Other Operating Costs	1,292,611	3,360,884	2,116,782	3,912,880	1,796,098	84.9%
Capital Purchases	1,101,042	2,753,511	992,532	1,100,069	107,537	10.8%
Debt Service	89,839	214,844	-	-	-	N/A
Transfers to Other Funds	123,163	1,223,161	-	-	-	N/A
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	29,437,443	36,961,250	34,740,216	39,040,901	4,300,685	12.4%
Emergency Services	1,386,100	1,348,656	1,163,173	1,922,455	759,282	65.3%
Impact Fees Fund	-	1,100,000	-	-	-	N/A
TOTAL FIRE DEPARTMENT	**30,823,543**	**39,409,906**	**35,903,389**	**40,963,356**	**5,059,967**	**14.1%**

CITY OF SANTA FE
GENERAL GOVERNMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Mayor's Office	668,199	406,883	667,169	733,795	66,626	10.0%
City Council	521,385	652,878	747,867	949,548	201,681	27.0%
City Manager	701,546	916,077	1,144,336	1,583,280	438,944	38.4%
City Attorney	2,939,449	3,207,144	3,147,697	3,692,722	545,025	17.3%
Internal Audit	837	173,975	150,000	200,000	50,000	33.3%
Municipal Court	1,964,734	1,934,989	2,377,354	2,518,122	140,768	5.9%
Risk Management	7,196,538	7,395,374	8,684,414	10,248,623	1,564,209	18.0%
Safety	1,949,324	1,991,533	4,298,918	4,541,887	242,969	5.7%
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,502,506	5,644,444	6,556,468	7,207,126	650,658	9.9%
Contractuals & Utilities	1,042,516	1,186,638	1,270,827	2,235,800	964,973	75.9%
Repairs & Maintenance	4,415	12,503	6,775	7,944	1,169	17.3%
Supplies	213,169	231,612	422,928	417,422	(5,506)	-1.3%
Insurance	8,118,866	8,731,916	11,642,810	13,010,307	1,367,497	11.7%
Other Operating Costs	974,726	869,618	1,186,947	1,539,378	352,431	29.7%
Capital Purchases	23,315	-	131,000	50,000	(81,000)	-61.8%
Transfers to Other Funds	62,500	2,120	-	-	-	N/A
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	6,696,573	7,273,455	8,173,823	9,640,867	1,467,044	17.9%
Law Enforcement	99,577	18,490	60,600	36,600	(24,000)	-39.6%
Risk Management	7,784,261	7,948,567	9,514,876	11,319,574	1,804,698	19.0%
Workers' Compensation	1,361,601	1,438,340	3,468,456	3,470,936	2,480	0.1%
TOTAL GENERAL GOVERNMENT	**15,942,012**	**16,678,851**	**21,217,755**	**24,467,977**	**3,250,222**	**15.3%**

CITY OF SANTA FE
HUMAN RESOURCES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	3,505,379	2,002,176	2,042,177	2,323,886	281,709	13.8%
Contractuals & Utilities	1,369,172	1,232,782	1,442,277	1,613,541	171,264	11.9%
Repairs & Maintenance	-	67	-	-	-	N/A
Supplies	32,950	60,643	115,320	115,320	-	0.0%
Insurance	22,670,557	24,089,218	28,297,999	29,155,109	857,110	3.0%
Other Operating Costs	347,409	324,764	377,220	479,502	102,282	27.1%
Capital Purchases	-	199	-	-	-	N/A
Transfers to Other Funds	75,000	235,405	75,000	96,824	21,824	29.1%
TOTAL HUMAN RESOURCES	**28,000,468**	**27,945,254**	**32,349,993**	**33,784,182**	**1,434,189**	**4.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	4,087,127	2,513,524	2,595,897	3,024,788	428,891	16.5%
Santa Fe Health/Dental	23,834,738	25,398,056	29,678,552	30,683,850	1,005,298	3.4%
Unemployment Claims	78,602	33,673	75,544	75,544	-	0.0%
TOTAL HUMAN RESOURCES	**28,000,468**	**27,945,254**	**32,349,993**	**33,784,182**	**1,434,189**	**4.4%**

CITY OF SANTA FE
INFORMATION TECHNOLOGY & TELECOMMUNICATIONS - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
ITT Administration	5,208,743	4,644,452	2,466,666	2,495,776	29,110	1.2%
End User Services	870,468	810,534	995,253	1,044,346	49,093	4.9%
Enterprise Application Services	2,254,979	4,904,828	2,752,479	4,962,145	2,209,666	80.3%
Enterprise Project Management	2,305,733	1,258,462	1,688,210	1,707,069	18,859	1.1%
Infrastructure Services	4,866,317	7,123,386	7,116,949	13,636,350	6,519,401	91.6%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,845,686**	**8,826,129**	**58.8%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,337,269	4,754,749	5,754,695	5,852,899	98,204	1.7%
Contractuals & Utilities	1,983,543	2,361,975	2,395,326	7,328,825	4,933,499	206.0%
Repairs & Maintenance	97,865	207,374	171,000	57,032	(113,968)	-66.6%
Supplies	1,246,244	2,312,322	1,943,221	4,380,579	2,437,358	125.4%
Insurance	97,986	199,165	154,947	156,839	1,892	1.2%
Other Operating Costs	3,061,424	5,398,800	2,744,100	4,099,082	1,354,982	49.4%
Capital Purchases	427,312	382,894	498,715	1,088,715	590,000	118.3%
Debt Service	4,596	14,970	-	-	-	N/A
Transfers to Other Funds	3,250,000	3,109,412	1,357,553	881,715	(475,838)	-35.1%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,845,686**	**8,826,129**	**58.8%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	-	2,487,000	-	-	-	N/A
1/2% GRT Income Fund	3,652,744	500,000	1,598,753	1,549,715	(49,038)	-3.1%
Services to Other Depts	11,853,495	15,754,662	13,420,804	22,295,971	8,875,167	66.1%
TOTAL INFO. TECH. & TELECOMM.	**15,506,239**	**18,741,662**	**15,019,557**	**23,845,686**	**8,826,129**	**58.8%**

CITY OF SANTA FE
METROPOLITAN REDEVELOPMENT AGENCY - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	95,505	280,848	304,396	404,921	100,525	33.0%
Contractuals & Utilities	-	257,769	271,326	202,218	(69,108)	-25.5%
Supplies	2,755	3,966	2,500	6,500	4,000	160.0%
Insurance	-	-	-	13,213	13,213	N/A
Other Operating Costs	578	25	16,333	47,995	31,662	193.9%
Capital Purchases	-	29,040	-	-	-	N/A
TOTAL METRO. REDEV. AGENCY	**98,838**	**571,648**	**594,555**	**674,847**	**80,292**	**13.5%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Economic Development	98,838	571,648	594,555	674,847	80,292	13.5%
TOTAL METRO. REDEV. AGENCY	**98,838**	**571,648**	**594,555**	**674,847**	**80,292**	**13.5%**

CITY OF SANTA FE
PLANNING & LAND USE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Land Use Administration	2,367,400	3,071,174	2,795,125	3,572,244	777,119	27.8%
Affordable Housing	7,395,395	9,602,417	8,623,080	8,922,060	298,980	3.5%
Building Permit Division	761,270	748,602	918,364	969,734	51,370	5.6%
Enforcement Division	-	230,175	11,120	786,524	775,404	6973.1%
Historic Preservation	512,549	562,682	596,405	615,488	19,083	3.2%
Inspections Division	1,887,809	1,990,066	2,191,763	1,815,092	(376,671)	-17.2%
Planning Division	789,780	1,058,819	1,106,288	1,164,812	58,524	5.3%
Technical Review	514,484	672,511	734,037	910,327	176,290	24.0%
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,756,281**	**1,780,099**	**10.5%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	5,760,345	6,249,650	6,939,025	8,029,070	1,090,045	15.7%
Contractuals & Utilities	5,890,619	6,811,529	5,721,590	6,078,885	357,295	6.2%
Repairs & Maintenance	-	-	2,549	2,549	-	0.0%
Supplies	76,864	61,622	108,670	79,770	(28,900)	-26.6%
Insurance	231,348	272,503	252,181	253,848	1,667	0.7%
Other Operating Costs	852,821	706,074	717,167	1,077,159	359,992	50.2%
Capital Purchases	723,854	81,525	235,000	235,000	-	0.0%
Transfers to Other Funds	692,837	3,753,544	3,000,000	3,000,000	-	0.0%
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,756,281**	**1,780,099**	**10.5%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	8,366,438	12,717,660	12,105,390	13,934,072	1,828,682	15.1%
Impact Fees Fund	52,555	73,382	89,689	96,676	6,987	7.8%
Community Development	5,796,083	5,145,153	4,781,103	165,533	(4,615,570)	-96.5%
Affordable Housing Trust	-	-	-	4,560,000	4,560,000	N/A
Historic Preservation	13,650	-	-	-	-	N/A
Land Development	(38)	251	-	-	-	N/A
TOTAL PLANNING & LAND USE	**14,228,688**	**17,936,446**	**16,976,182**	**18,756,281**	**1,780,099**	**10.5%**

CITY OF SANTA FE
POLICE DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Police Administration	16,998,485	16,018,403	16,292,637	20,641,585	4,348,948	26.7%
Police Operations	22,776,915	25,620,798	25,820,842	27,190,083	1,369,241	5.3%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	25,612,137	28,966,505	29,652,902	31,900,978	2,248,076	7.6%
Contractuals & Utilities	963,171	1,352,584	1,652,589	2,341,377	688,788	41.7%
Repairs & Maintenance	136,043	185,789	199,571	211,652	12,081	6.1%
Supplies	948,770	992,809	1,048,408	1,169,339	120,931	11.5%
Insurance	1,166,076	1,528,482	1,804,304	1,871,425	67,121	3.7%
Other Operating Costs	6,220,180	5,192,392	6,232,342	8,208,202	1,975,860	31.7%
Capital Purchases	4,729,022	3,420,641	1,523,363	2,128,695	605,332	39.7%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	34,491,909	36,470,397	36,813,085	40,028,902	3,215,817	8.7%
Animal Services	64,883	1,001	4,705	5,000	295	6.3%
Law Enforcement	5,218,608	5,167,803	5,295,689	7,797,766	2,502,077	47.2%
TOTAL POLICE DEPARTMENT	**39,775,400**	**41,639,201**	**42,113,479**	**47,831,668**	**5,718,189**	**13.6%**

CITY OF SANTA FE
PUBLIC UTILITIES DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Public Utilities Administration	3,439,284	2,186,009	4,093,704	3,603,083	(490,621)	-12.0%
Conservation & Sustainability	1,683,306	2,996,761	1,863,966	2,461,222	597,256	32.0%
Environmental Services	16,374,733	16,404,095	24,796,557	25,088,574	292,017	1.2%
Utility Customer Service	5,209,828	5,570,280	9,386,993	8,499,202	(887,791)	-9.5%
Wastewater Management	15,020,899	19,010,286	22,709,242	19,143,241	(3,566,001)	-15.7%
Water Operations	33,072,862	28,764,046	37,866,802	41,668,518	3,801,716	10.0%
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,463,840**	**(253,424)**	**-0.3%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	18,419,827	20,857,558	25,224,532	27,312,171	2,087,639	8.3%
Contractuals & Utilities	11,803,762	14,713,448	21,043,173	23,094,615	2,051,442	9.7%
Repairs & Maintenance	3,275,335	4,440,282	5,502,600	2,751,197	(2,751,403)	-50.0%
Supplies	2,494,884	2,702,179	4,476,977	4,279,597	(197,380)	-4.4%
Insurance	1,915,740	1,321,683	1,387,124	2,110,781	723,657	52.2%
Other Operating Costs	26,688,716	19,094,961	19,075,526	18,304,237	(771,289)	-4.0%
Capital Purchases	(16,076)	1,747,318	4,996,700	4,517,500	(479,200)	-9.6%
Debt Service	2,541,386	2,533,711	5,584,253	5,607,942	23,689	0.4%
Transfers to Other Funds	7,677,338	7,520,336	13,426,379	12,485,800	(940,579)	-7.0%
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,463,840**	**(253,424)**	**-0.3%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Resource Conservation	957,664	1,028,544	1,576,663	1,074,797	(501,866)	-31.8%
Community Development	21,411	10,132	-	-	-	N/A
Waste Water Management	15,020,899	19,010,286	22,709,242	19,143,241	(3,566,001)	-15.7%
Water Management	34,734,757	31,750,675	39,730,768	41,668,518	1,937,750	4.9%
Environmental Services	16,369,733	16,404,095	24,271,157	25,088,574	817,417	3.4%
Utilities Administration	7,696,448	6,727,744	12,429,434	11,027,488	(1,401,946)	-11.3%
Conservation & Sustainability	-	-	-	2,461,222	2,461,222	N/A
TOTAL PUBLIC UTILITIES	**74,800,912**	**74,931,476**	**100,717,264**	**100,463,840**	**(253,424)**	**-0.3%**

CITY OF SANTA FE
PUBLIC WORKS DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Public Works Administration	1,200,030	1,145,485	1,425,488	1,927,735	502,247	35.2%
Facilities Maintenance	12,260,213	20,222,466	15,254,797	19,187,457	3,932,660	25.8%
Metropolitan Planning Organization	434,664	654,398	550,173	555,716	5,543	1.0%
Municipal Recreation Complex	5,051,856	3,723,000	7,843,879	8,391,096	547,217	7.0%
Parking Division	5,541,877	5,594,102	5,996,713	6,363,772	367,059	6.1%
Parks Division	13,918,361	21,194,725	16,247,453	17,846,418	1,598,965	9.8%
Complete Streets Division	18,806,207	19,205,380	11,896,032	12,245,589	349,557	2.9%
Transit	9,573,051	11,842,458	12,529,528	14,214,186	1,684,658	13.4%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,731,969**	**8,987,906**	**12.5%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	21,808,242	25,366,671	27,510,356	31,698,795	4,188,439	15.2%
Contractuals & Utilities	12,433,174	12,206,210	16,264,303	15,853,300	(411,003)	-2.5%
Repairs & Maintenance	2,581,244	2,043,705	3,480,555	3,894,447	413,892	11.9%
Supplies	2,227,847	2,111,226	2,346,667	2,342,596	(4,071)	-0.2%
Insurance	2,315,341	2,022,576	2,166,614	2,025,985	(140,629)	-6.5%
Other Operating Costs	9,130,701	9,620,708	5,629,004	7,279,571	1,650,567	29.3%
Capital Purchases	5,096,536	6,714,553	4,136,032	4,826,640	690,608	16.7%
Debt Service	1,162,381	1,229,231	4,479,000	3,390,117	(1,088,883)	-24.3%
Transfers to Other Funds	10,030,792	22,267,134	5,731,532	9,420,518	3,688,986	64.4%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,731,969**	**8,987,906**	**12.5%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
General Fund	28,985,909	37,040,272	30,230,696	34,019,021	3,788,325	12.5%
Resource Conservation	168,117	181,508	185,517	189,670	4,153	2.2%
City Drainage Fund	1,089,736	2,244,125	3,316,540	3,591,329	274,789	8.3%
Impact Fees Fund	2,106,152	1,938,504	-	-	-	N/A
Transportation Grants	501,535	727,456	679,552	1,125,307	445,755	65.6%
Community Development	1,117,260	226,407	-	-	-	N/A
Plaza Use Fund	43,914	126,352	35,500	35,500	-	0.0%
Public Facilities Fund	145,696	-	-	-	-	N/A
Quality of Life	95,696	283,425	251,650	252,650	1,000	0.4%
Streets & Roadways	2,730,650	2,373,138	1,762,470	1,843,090	80,620	4.6%
1/2% GRT Income Fund	4,798,712	11,469,661	4,403,702	7,194,207	2,790,505	63.4%
Railyard Properties	1,397,210	1,201,157	2,787,346	1,993,833	(793,513)	-28.5%
Midtown Campus	4,784,087	4,683,508	4,773,939	5,262,197	488,258	10.2%
Municipal Recreation Complex	3,773,528	3,723,000	4,920,289	5,216,798	296,509	6.0%
Parking	5,541,877	5,594,102	5,996,713	6,363,772	367,059	6.1%
Transit Bus System	9,506,181	11,769,399	12,400,149	13,644,595	1,244,446	10.0%
TOTAL PUBLIC WORKS	**66,786,259**	**83,582,014**	**71,744,063**	**80,731,969**	**8,987,906**	**12.5%**

CITY OF SANTA FE
REGIONAL AIRPORT DEPARTMENT - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	2,614,327	3,574,688	3,772,121	3,778,552	6,431	0.2%
Contractuals & Utilities	1,064,107	337,580	153,700	189,200	35,500	23.1%
Repairs & Maintenance	215,757	268,193	206,000	927,500	721,500	350.2%
Supplies	272,939	659,583	326,000	475,000	149,000	45.7%
Insurance	83,447	139,942	153,021	181,320	28,299	18.5%
Other Operating Costs	2,013,693	2,977,945	701,055	1,032,460	331,405	47.3%
Capital Purchases	80,069	96,340	70,000	1,155,000	1,085,000	1550.0%
Transfers to Other Funds	-	20,634	-	-	-	N/A
TOTAL REGIONAL AIRPORT	**6,344,339**	**8,074,904**	**5,381,897**	**7,739,032**	**2,357,135**	**43.8%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Airport Fund	6,344,339	8,074,904	5,381,897	7,739,032	2,357,135	43.8%
TOTAL REGIONAL AIRPORT	**6,344,339**	**8,074,904**	**5,381,897**	**7,739,032**	**2,357,135**	**43.8%**

CITY OF SANTA FE
TOURISM SANTA FE - EXPENDITURES SUMMARY
PROPOSED FISCAL YEAR 2026/27 BUDGET

SUMMARY BY DIVISION	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Santa Fe Civic Center	5,919,304	7,321,648	8,605,275	9,368,057	762,782	8.9%
Visitors Bureau	5,807,609	7,261,247	7,663,875	8,910,731	1,246,856	16.3%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

SUMMARY BY CATEGORY	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Salaries, Wages & Benefits	3,386,663	3,986,931	4,136,679	4,340,017	203,338	4.9%
Contractuals & Utilities	1,295,969	2,153,482	2,241,100	2,618,700	377,600	16.8%
Repairs & Maintenance	136,189	132,177	186,000	198,040	12,040	6.5%
Supplies	220,193	216,412	224,950	873,482	648,532	288.3%
Insurance	137,973	171,541	164,531	168,743	4,212	2.6%
Other Operating Costs	5,981,009	7,224,868	6,049,807	7,564,669	1,514,862	25.0%
Capital Purchases	65,843	119,033	1,350,000	595,000	(755,000)	-55.9%
Debt Service	450,787	396,625	1,758,386	1,761,148	2,762	0.2%
Transfers to Other Funds	52,286	181,826	157,697	158,989	1,292	0.8%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

SUMMARY BY FUND	ACTUAL EXPENDITURES 2023/24	ACTUAL EXPENDITURES 2024/25	2025/26 ORIGINAL BUDGET	PROPOSED BUDGET 2026/27	$ CHANGE 2025/26 vs. 2026/27	% CHANGE 2025/26 vs. 2026/27
Lodgers' Tax Fund	5,807,609	7,261,247	7,663,875	8,910,731	1,246,856	16.3%
Santa Fe Convention Center	5,919,304	7,321,648	8,605,275	9,368,057	762,782	8.9%
TOTAL TOURISM SANTA FE	**11,726,913**	**14,582,895**	**16,269,150**	**18,278,788**	**2,009,638**	**12.4%**

Signature: Andy Hopkins

Email: ajhopkins@santafenm.gov

Signature: ANDREA PHILLIPS (May 21, 2026 16:47:32 MDT)

Email: akphillips@santafenm.gov

Signature: BRIAN MOYA

Email: bjmoya@santafenm.gov

FY27 Proposed Budget Q and A (updated May 22, 2026)

Community Engagement Department

1. ***Goals and KPIs for department and divisions?*** **See above.**

2. ***Is the decrease in this budget primarily because we do not have elections this year?*** Yes, $600k was budgeted in FY25 for the election/public finance. This expense is not in the FY27 budget.

3. ***$75k contract for shopping cart management – is this still the right amount for this contract? How are we tracking the need/performance of this contract?*** The shopping cart contract is set to expire at the end of this fiscal year. We have met with the City Manager to discuss alternative solutions moving forward. In the interim, we have requested that Nebula submit a quote for a six (6) month contract extension to allow sufficient time to evaluate long-term options, including bringing the service in-house or issuing a new competitive solicitation for contracted services. Regardless of the interim approach, a more sustainable long-term solution is needed. Currently, the City spends more than $50,000 annually collecting shopping carts from surrounding businesses without any compensation or cost recovery from the retailers benefiting from the service.

4. ***How has OpenGov for the CRM changed how the public experiences work orders? In the past we haven't had a good way for Councilors to independently track the work orders we've put in – is that now more possible with this change?*** OpenGov will improve the public experience for work orders by providing status updates on long-term requests. Constituents will continue to submit work orders through the CRM Public Dashboard, maintaining the current public submission process. The primary change introduced by OpenGov is the internal workflow for processing work orders after they are received by our office through the CRM system. Public Works will serve as the primary user of OpenGov through its integration with ArcGIS and the current Survey123 CRM platform. This integration will allow departments to receive, manage, and track the progress of work orders more efficiently. As updates are entered into OpenGov by departments, Constituent Services will have access to current work order information and can communicate timely updates back to constituents. This process is intended to improve transparency, coordination between departments, and overall communication regarding the status of long-term work orders. The current CRM system does include a councilor dashboard that provides access to this information. However, according to Leonard Padilla, GIS Coordinator, no councilors have activated their accounts or requested training. The capability is nonetheless available for councilors to independently track work orders.

5. ***Does the Clerk's Office still oversee website updates?*** Yes, all website management and maintenance, including updates, are performed by our Communications & Marketing team, which fall under Community Engagement/Clerk's Office.

Interdepartmental webpage edits and updates are submitted by requests and processed by our team accordingly. For larger, more substantial updates, our Comms & Marketing team works with a contracted Web Developer (Consumer 51).

6. ***We've had money for upgrades to Council Chambers I believe in the Clerk's budget in past years. Is that money still there?*** Yes, unfortunately we have not been able to spend that money, and Public Works has assured us that the spending will start happening. The city has contracted with Woven Architecture for the Council Chambers renovation the process has started.

7. ***There is a 51% reduction in "Other operating costs" from FY26 to FY27 – what is included in that line item?*** Dues, Print/Publish, Advertising, Services of Other City Departments, Postage and Mail Services, Equipment/Machinery Rental, Campaign Funding Assistance and Stipends. The primary decrease was driven by the $600k in Campaign Funding Assistance.

8. ***Any other large contracts we should be aware of?*** None at this time, but we will be seeking a Records Management System for Records and Archives.

Community Services-Libraries

1. ***With this budget will we be able to expand library hours and get at least one branch open on Sunday?*** – No, the proposed budget does not contemplate Sunday hours. Staff have prepared multiple scenarios on how to accomplish this for Santa Fe libraries and would welcome a work session on this for FY28. Adding another service day without negatively impacting services would require additional operating resources. Estimated costs to add Sunday hours are approx. $200k for one branch.

2. ***County contributions – have we started discussions with County on this? –*** The city will continue to work on advocating for a more robust county partnership in FY27.

3. ***Contract Admin being moved to department administration – how will this impact operations? –*** This change was made in 2024 to centralize CHS/CSD Admin operations. The library processes approximately 18 contracts annually.

Community Services—Recreation

1. ***Goals for and KPIs for division?***
   Goals and KPIs are completed in the dashboard and sent to GB. We are happy to provide more context for questions on any specific question.

2. ***Two new recreation supervisors – what will this mean for service delivery?***
   Recreation supervisors plan, organize, and direct recreation programs, special events and facility operations while managing staff and volunteers. They will oversee daily activities, ensure safety standards, and act as a liaison between community members and

department management. These employees also coordinate with aquatic supervisors on activities and programs, work with Recreation Coordinators on programs and events, schedules and coordinate sports leagues and tournaments, reports to Recreation Managers and Facility Managers. These positions support 15 more spots for OOS youth programs.

3. ***Afterschool and summer programming – how many kids will we be able to serve in both programs? Increase, decrease, or same as FY26? What is the possibility of expanding the summer program to include an additional school site? Why are we not taking state funding for afterschool and summer programming and are we looking into starting that? I believe it would be more revenue for us and of course more affordable for the families we serve.***
   We were able to serve 84 after-school participants this school year. There was an increase in FY26 as a new supervisor position was created, which allowed us to serve an additional 15 participants. Summer program numbers have remained consistent, and we are serving close to 500 youth participants. Although we do have a waiting list, we are serving as many children as possible while adhering to staff-to-child ratio requirements. We recommended close to 87 summer temporary staff positions this year were recommended for hire. More than in previous years. The staff we hire are typically high school or college students who often have vacations, school commitments, and other scheduling conflicts. On average, about 10 staff call out each day during the summer. Ensuring adequate coverage and maintaining proper staff-to-child ratios is extremely important. We also lost approximately 10 candidates after they backed out before the positions even began. We could easily expand by an additional program site if the Youth Programs budget was increased to support staffing positions and operational needs.

   Youth Recreation programs are classified as recreation programs (not childcare programs) to meet current state requirements. Currently, we operate out of the GCCC, and the community room is utilized for many purposes, including rentals, meetings, and events, rather than solely for Youth Programs. In order to begin contracting with the state to capitalize on universal childcare funds, the city will need to have a facility for childcare that meets ECECD standards, adhere to the established ECECD wage and career ladder, and all the policies for safe and educational childcare therein. We would also need a dedicated space specifically for Youth Programs that meet childcare standards. This is an opportunity we hope to explore in the future.

4. ***County – how many users are county residents and have we talked to County about help with funding?***
   Non-City of Santa Fe zip code use from 1/1/25 to 1/1/26: Fort Marcy, Sal P. and BC pool had 330 memberships, with 5,300 entries (uses). The GCCC had 1,300 memberships, 37,000 entries (uses). We hope to partner meaningfully with the county and state in the future, as City recreation facilities, specifically the GCCC, hold regional importance for athletes.

5. ***Pool hours – what is the goal for these to be for the summer and rest of the year? What is the plan with lifeguards?***
   The goal for summer hours from 5/26/26 to 8/2/26 is to operate and staff the GCCC (3 pools) and the BC pool. (GCCC M-F 6:00am to 6:00pm, Sat/Sun 8:30am to 3:30pm) (BC Pool M-F 6:00am to 7:00pm, Sat/Sun 10:30am to 5:00pm). Pool staff are working to hire

enough staff to open all three operating pools, for at least partial day usage at Ft Marcy. Long term solutions for lifeguards is an ongoing conversation. Outsourcing lifeguard duties to a qualified service provider could be a solution for Fort, Sal P. and BC when open. All current guards would then work at the GCCC. Better coverage, less down time, sustainable lifeguard schedules, increased programming, extended hours, increased revenue.

Community Services-Senior Services

1. ***What is meant by the goal to "expand equitable access and inclusion" and how does this budget get us there?***
   The Senior Services will ensure that all individuals that we can recruit to volunteer in our volunteer programs: Foster Grandparent (FGP), Senior Companion (SCP), Care Companion (CCP), and Retired Senior Volunteer (RSVP) Programs are encouraged to apply. The funding that is awarded by the Corporation for National and Community Services (AmeriCorps) and State of New Mexico Aging and Long-Term Services Department (ALTSD) for this program is based on Volunteer Service Year "VSY" service hours for FGP, SCP, and CCP. A VSY is equivalent to 1044 hours and RSVP bases the volunteer hours on $1 for one volunteer hour. The City of Santa Fe's agreement with AmeriCorps and the ALTSD varies for each program based on awarded VSY's. By increasing the number of volunteers and ensuring that everyone who is 60 and over is not excluded from taking part in the volunteer program regardless of their situations. We have experienced low numbers of volunteers after covid which limits our ability to meet the goals set by AmeriCorps and ALTSD.

Community Services-Youth and Family Services

1. ***Goals and KPIs for the Division?***
   Please see the Goals and KPIs worksheet for a full overview. If there are questions on any specific metric, priority, or target, I am happy to provide additional detail and context.

2. ***Parking Lot – Are we still looking to rename this division to better reflect what they actually do?***
   This is a possibility and will be discussed with the Mayor and City Manager.

3. ***Two Program Managers and a Data, Reporting, and Policy Development Manager – How will these positions impact the division? What will they do?***
   These are critical positions to strengthen the City's homelessness response.

- Data, Reporting, and Policy Development Manager: This role ensures we can accurately track performance, measure outcomes, and make data-informed decisions. Without in-house expertise, we are overly reliant on outside data sources that may not fully capture local conditions or be easily validated.
- Program Managers: These roles will provide much needed additional capacity, improve program oversight, contract management, implementation, and accountability across homelessness initiatives. They will also help ensure City investments, projects, and initiatives are producing measurable results.

Historically, *the division had only one Program Manager overseeing all homelessness work citywide*. As a result, prior department leadership had to dedicate a substantial amount of time to filling operational gaps. Adding these positions helps right-size the work and align staffing levels with peer cities, many of which have full departments or larger teams dedicated to housing and homelessness because of the scale and urgency of these issues.

4. ***Richards Micro-Community – Seeing up to 35 families. I thought the original stated potentially up to 50. Why only 35?***
   The number refers to 35 units, not 35 people, and that has not changed. Each unit is approximately 120 square feet and can generally accommodate 2–3 people depending on family composition and needs. We also want to be intentional about maintaining an appropriate staff-to-client ratio and avoiding overcrowding. The goal is to provide a supportive, stable environment that leads to successful outcomes, not simply maximize density.

5. ***Is one of the goals for FY27 to open a Micro-Community in District 1 or District 3, based on the 2025 resolution committing to one per district?***
   Future micro-community expansion would depend on Council direction and partnership. We have several potential sites that could be evaluated, but moving forward would require Council support on preferred locations.
   We currently have 35 units remaining after the Richards deployment. However, to activate additional sites across the city, we would need funding for site development, operations, staffing, and related infrastructure.

6. ***Parking Lot – Plan to deploy additional pallet shelters?***
   Yes. We are actively evaluating locations for a third site for our remaining Pallet units in stock, and considering how additional units could support future sheltering needs.

7. **$2.1M decrease in budget – why?**
   The budget decrease is tied to one-time funding changes and the completion or transition of certain initiatives that were previously supported with temporary resources. It does not necessarily reflect a reduction in priority, but rather a shift in funding sources and budget alignment. We can provide a detailed breakdown of the specific line items if helpful.
   Additionally, YFD's FY26 Community Development Fund 240 budget (supporting Children & Youth, Human Services, including Homelessness and Veteran Programs) was originally budgeted with an approximate $2.6 million General Fund transfer that exceeded the amount our department had requested at the time. To align the budget and correct this technical over-allocation, that transfer amount was removed in the FY27 proposed budget, resulting in a corresponding $2.6 million reduction to YFD's overall budget. Importantly, this adjustment does not represent a reduction in programs or services; rather, it reflects a back-end fund transfer correction between YFD accounts that was unnecessary to continue in FY27.

Department of Economic Development and Creative Industries

1. ***What is the Creative Hub?***

The Creative Hub initiative began as a collaborative effort between Economic Development and Arts & Culture to strengthen Santa Fe's creative economy as a targeted industry sector. The City received grant funding through the State Creative Industries Division to help establish the initiative and support early planning, coordination, and ecosystem development efforts.

The initiative follows the Office of Economic Development's broader targeted industry development approach, which focuses on supporting and strengthening industry ecosystems through:

- Industry convenings and ongoing stakeholder engagement
- Relationship building and cross sector collaboration
- Business outreach and ecosystem coordination
- Asset mapping and identification of infrastructure gaps
- Workforce and education partnerships
- Technical assistance and resource navigation
- Communications, promotion, and visibility strategies
- Placemaking and district activation efforts
- Access to funding, grants, and support programs
- Long term strategic planning and industry growth opportunities

The Creative Hub is intended to help strengthen connections across Santa Fe's creative industries, including artists, makers, creative entrepreneurs, cultural organizations, educational institutions, and related businesses, while identifying long term opportunities for growth, collaboration, and economic impact within the sector.

The City intends to continue building this effort by strengthening connections between creative businesses and organizations, improving access to resources and support systems, and continuing to develop a more connected and resilient creative industry ecosystem over time and leveraging the support and efforts of the Small Business Navigator Program.

2. ***ARPA is ending – of the programs funded through OED, how many are being funded with a different funding source, how many are left unfunded, and how many were only designed to be one-time infusions?***

ARPA

- Small Business Navigator Program
- Downsizing and considering contract with NMSU using OED funds
- UNM- Native Business Development Coordinator
- Partnering with County and using OED funds
- SFCC Workforce Coordinator
- Translation services for community programs
- Contract Administrator
- Extended 1 yr more with 1x funds
- Smal Business Micro Grants
- Considering using OED funds

- Downtown Business Development Coordinator
- Considering using OED funds

One time funding:

- SFPS Work based Learning program
- South side Business Development Coordinator
- Workforce/Financial Literacy Coordinator
- Contracts Administrator
- SAFE grants
- Go Local Go Different
- Considering using OED funds
- SFCC support for Trades and Certification

3. ***Is there funding to continue with APRENDE?***
   The Aprende contract will expire 12.31.2026. SFCC has received Congressionally Directed Spending to support and expand the program in FY27. YFS staff will continue support collaboration on this valuable program and understand the Aprende program will need support in FY28.

Department of Economic Development and Creative Industries-*Economic Development*

1. ***New positions – are they term or permanent? It says they are term on the chart on page 23?***
   The proposed positions are intended to be permanent positions. The restructuring includes the creation of two project management/leadership support positions to help support coordination, implementation, and operations. There was a text error in the budget document showing that these are term positions-this will be fixed in the final adopted budget document.

2. ***What will be accomplished with new positions? Also, how many are already here from ARPA funding?***
   The positions are being created to help support a growing volume of projects, initiatives, grants, partnerships, and cross departmental coordination efforts across the department. The Office of Economic Development has grown significantly in both service and scope over the past several years, including expanded responsibilities related to workforce development, district activation, business support, communications, grants management, ecosystem building, strategic planning, and cross departmental initiatives. The positions utilize salary savings from the vacant Community Development Department Director position.

   Much of the current staffing structure remains heavily weighted toward entry level operational positions, with limited internal leadership and project management support capacity. The intent of the new positions is to strengthen internal coordination, implementation, communications, operational management, and leadership support as

the department continues to grow and integrate new functions. These positions would serve as part of the division's leadership and project management structure supporting the Director.

Existing positions initially supported through ARPA funding include the Downtown Business Coordinator position and Contracts Administration support. In addition, the City has supported several partner-based positions connected to broader economic and workforce development efforts, including the Small Business Navigator through NMSU, a Workforce Coordinator partnership with SFCC, and Native Business Development support through UNM.

Department of Economic Development and Creative Industries-Arts and Culture

1. ***What are the community events and nonprofits funded by A & C?***
   Arts & Culture maintains partnership agreements and sponsorship support for a range of cultural events, nonprofit organizations, and community-based activations throughout the year. Major recurring partnerships currently include:
   - Human Rights Alliance (Santa Fe Pride)
   - Vital Spaces (Juneteenth)
   - New Mexico Lowrider Arte y Cultura (Lowrider Day on the Plaza and Christmas Light Cruise)
   - Santa Fe Indigenous Center (Honoring Native Nations Pow Wow on the Plaza)

   In addition to larger annual partnerships, Arts & Culture also supports a rolling sponsorship and community funding program throughout the year. The specific organizations and events vary annually based on applications, funding availability, and community programming, but typically more than 30 organizations, events, and cultural initiatives receive support each year.

2. ***New position – how will this impact operations and outcomes?***
   The new FY26 position was recently filled and is expected to strengthen both internal operations and external engagement capacity within Arts & Culture. Anticipated outcomes include increased community outreach and partnership coordination, improved operational efficiency, expanded capacity to support programming and cultural initiatives, and additional support for the City's Art in Public Places efforts and related projects.

3. ***District funding – highlight for new councilors***
   Raised to 15K per district for FY27; will formalize with updated guidelines and assistance for all councilors

4. ***How do we determine where new public art goes? Is there a plan we're following?***
   Arts & Culture is currently working to redevelop and update both the Art in Public Places (AIPP) policies and the broader strategic framework guiding public art investments and placement throughout the city. The recently hired Assistant Arts & Culture Director brings extensive experience in public art management and will help support this work moving forward.

   Public art locations are determined through several factors and processes, including:

- The City's 2% for Public Art ordinance and related project guidelines
- Geographic and equitable distribution considerations across the city
- Councilor and constituent requests and community identified opportunities
- Capital projects and City facility improvements
- Opportunities identified through partnerships, invitations, or site-specific needs

In many cases, public art opportunities emerge through efforts to improve and activate public facing City facilities and infrastructure, such as the Public Works complex on Siringo, the Convention Center parking garage, and other civic spaces throughout Santa Fe.

5. ***Greer Garson Theater- what's the plan and how much City funding is proposed to be invested?***
   A feasibility study for the Greer Garson Theater was recently completed and identified four potential operating and redevelopment scenarios for consideration. The project team is currently reviewing the study with the City Manager's Office and plans to brief the Governing Body as well.

   The Midtown Redevelopment Authority (MRA) is serving as a key project partner in the effort. The city and project partners are also exploring potential capital outlay funding opportunities and other funding sources to support future redevelopment or operational investments. At this stage, the level of direct City financial contribution remains under discussion and has not yet been finalized.

Emergency Management

1. ***EM Exercises debrief: how prepared are we, and where are the gaps?***
   More than happy to meet about this at council's leisure to discuss in detail. Departments are individually strong within their respective domains, and throughout the organization there is a notable ability and willingness to develop and maintain situational awareness, use resources in novel ways when necessary, and coordinate with external partners during routine incidents.

   Challenges arise when our normal systems become overwhelmed; real-time information sharing, tracking and managing resources being used outside of their normal scope, and rapidly planning for what might be needed in the next days or weeks. Those findings are the primary drivers for requested enhancements in this budget. The Virtual EOC buildout to facilitate improved coordination both steady state and during disasters (Q7), and the Assistant Director position budget enhancement to support continued focus on high-frequency citywide preparedness activities (Q4/5).

   In short - there is work to do, but we're doing well.

2. ***How do I find Ready Santa Fe?***
   ready.santafenm.gov

During incidents, SFPD and Emergency Management link directly to the website in public notifications. It is most frequently used for day-to-day public safety notifications in parallel with Alert Santa Fe (i.e. major road closures, requests to avoid certain areas due to police activity). It is the same system we will utilize for providing improved information during major incidents requiring evacuations, opening shelters, or delivering other critical emergency information. This tool has built capacity within the organization steady state and avoids the need to create something similar in real time during a disaster (as was the case in other recent disasters in NM) or create a system that is only utilized during disasters. No other organization in NM has something comparable for both routine public safety and disaster use. In general, comparable capabilities only exist in much larger, better resourced jurisdictions.

3. ***How is EM advertising resources to the public? Do we have them at events, like Economic Development or PD?***

Before Disasters:
Emergency Management provides connectivity to digital, technological, and in-person preparedness resources through both hazard-specific in-person events (like Wildfire Preparedness Day earlier this month, PNM/EMNRD wildfire town hall earlier this fiscal year), and by developing and managing content and systems that other departments with much larger public-facing presences push through their work, such as Ready Santa Fe (see Q3), and Alert Santa Fe. Additionally, this FY Emergency Management worked with Communications to develop an ongoing "evergreen" preparedness campaign which regularly runs on City-managed social media and listservs – with expanded outreach planned for FY27.

During Disasters:
Emergency Management is authorized to send government alerts through the Integrated Public Alert and Warning System (like an Amber Alert), as well as Alert Santa Fe and Ready Santa Fe. During a disaster, all systems will be utilized: IPAWS for communicating life safety and emergency protective measures (ex. Evacuation orders), Ready Santa Fe in parallel for the visual display of the same information (areas under evacuation orders, evacuation routes, shelter locations), and Alert Santa Fe as both a redundancy and a way to provide ongoing situational awareness to constituents after initial protection measures have taken place.

At every opportunity, whether an in-person event, a media interview, or a constituent email, Emergency Management pushes the importance of ensuring government alerts are enabled on all devices, constituents are opted in to Alert Santa Fe, and that they are aware that Ready Santa Fe exists.

4. ***Why reclassify to Assistant Director in a two-person department, and what contracts were cut to fund it?***

Budget/ HR Context:
When a director vacancy occurred in FY26, the department froze the now-open position and redirected those funds to consultant support to keep training, exercises, and planning on track while the (now) director led the program through the transition. This budget

restores FY26 staffing levels to baseline. The contractual reduction is the offset; no recurring or multi-year contracts were cut.

The reclass for the Assistant Director is an administrative change. The Coordinator job description referred to the role as a Deputy Director, and that position did perform duties consistent with an Assistant/Deputy, without commensurate pay or title. HR has reviewed and approved the reclassification. Without budget enhancements, the existing EM budget is adequate to pay for the reclassified position at the very low end of the classification range. The proposed budget enhancement allows for paying an equitable salary for a qualified candidate, ensuring competitive pay with NM Department of Homeland Security and Emergency Management as well as other metro-area EM programs supervisory positions. The net budget impact after contractual offsets is $15,262.

Operational Context:
The structure mirrors Fire/Police department structures that provide clear ownership of certain mission areas and functions to individual assistant or deputy chiefs. It is a start to bringing the EM program in line with best practices observed throughout the US and provides for succession and program continuity during routine staffing turnover – the same as with Police and Fire (see: Interim Chiefs leading both departments currently, with no gaps in service).

The Assistant Director owns the preparedness mission day-to-day: response-oriented planning, training, exercises, corrective action tracking, and associated preparedness-related finances. During major incidents, they serve as EOC Director, coordinating roles among departments, while the EM Director coordinates with executive leadership, external partners, and mutual aid resources. The job description has been overhauled to provide clear ownership of these functions.

The Director owns all other aspects of the program: executive and interagency coordination, the hazard mitigation mission area, grants and finances, advanced technology adoption, continuity of operations planning, and overall program management.

Further, two people is not the end goal. To bring the department in line with comparable jurisdictions in the US, the program needs dedicated staff capacity in GIS and communications to support situational awareness and public information and warning capabilities; hazard mitigation and critical infrastructure protection expertise; and grant/program administration. This is step one of a deliberate build that will take several FYs.

5. ***What's being cut in contractuals, and what's the impact?***
   Targeted consultant support remains valuable and will continue to be pursued for specialized planning, training, and technology needs, but is not a major part of this budget within EM's request (*see Q6 for exception).

6. ***What's driving the large increase in Other Operating Costs?***
   Primarily non-recurring contractual fees for developing a virtual Emergency Operations Center, as well as moderate increases to software license tiers for specific users (Power Automate, ArcGIS). This will be a structured coordination environment built on Microsoft

Teams, integrating ArcGIS and other platforms the City already pays for. No new platform purchase is required. This is a direct corrective action to what trainings and exercises this FY documented (see Q1) and will improve the City's ability to facilitate a coordinated response to, and recovery from, no-notice incidents that routinely happen in the City - such as sudden monsoonal flooding, security incidents at special events, and aircraft incidents.

Finance Department

1. ***Goals/KPIs:*** Will be shared for FY26 in the dashboards and FY 27 goals.

2. ***What is CM approval authority for contract amendments at this time?*** It is currently $200k for contracts and $60k for Budget Adjustments. CM can sign for contract amendments that do not increase the scope.

3. ***Do we have data on impact of changes to procurement processes?*** It may be too early to tell. The city is in the middle of the procurement process internal audit project with Baker Tilly. We hope to have a report of recommendations by June/July. We have already implemented several improvements to help streamline this essential service and will have more to come. The recent "procurement modernization bill" approved by Governing Body is a great step in that direction. It clarified exemptions, increased the threshold for small purchases, and allowed for new types of procurement (Construction Manager at Risk-CMAR and call for applications).

4. ***What is the split funded position and who is it split with?*** It is an Accounting Financial Analyst, for which 40% is paid by Finance and 60% is paid by Public Utilities/Customer Service. This is because the position spends most of the time dealing with utility billing.

5. ***Big decrease in overall budget – why?*** It is in Budget Division, see question 9. Below.

6. ***Two new FTE in FY26 – are they already there or being added before end of FY? Impact on operations and outcomes?*** The Budget Analyst will likely not be hired until FY27. We are evaluating additional needs for financial reporting, budget management and capital planning/budgeting. The Financial Analyst was added in FY26.

7. ***What is the timeline for Questica (budget software)?*** We are looking at implementation for personnel budgeting this summer and will begin training Department users in full use of the program then as well. In the fall, we will begin rolling it out for full-time use for both personnel and other budgeting purposes. We are anticipating that we will use Questica for the full FY28 budget process in spring of 2027.

8. ***Procurement process updates – very interested in this. Do we have what we need in place to make these changes? What is the goal timeline for different purchase and procurement processes?*** We are working on the procurement process audit with Baker Tilly right now. This is an internal audit project, and we hope to have the recommendations report ready to share in June/July. See above for more info.

9. ***What is the $3.9M decrease in Budget division?*** Budget is where the capital and debt subsidies from the ½% GRT Income Fund [365] is budgeted. The debt transfers went down by $1.28M overall; while some payments went up according to the established schedules, overall debt service went down because in FY26 we will complete the payoff of the 2021 GRT Refunding Bonds, which were running just over $2M per year. On the subsidies side, a combination of improved revenue and a reduction in debt service payments per scheduled amortization schedules led to a reduced need for subsidies to the Midtown property and Railyard funds. Though several factors were in play here, the biggest single factor was debt service for the Railyard, which went down by just over $750K, again per the amortization schedule. Another significant factor was land rental income at the Railyard, which was previously unbudgeted, but we're seeing a consistent amount of just over $316K here so it was budgeted for FY27.

10. ***What is going on with contracts? Specifically contracts we had been using to assist with accounting and audits?*** We are reducing the CLA contract for audit support now that we are caught up with audits.

11. ***Big decreases in Lodgers Tax and ½% GRT Income Fund – why?*** On 1/12% GRT – see above. As for Lodgers' Tax – the decrease was mostly attributable to a one-time FY26 appropriation for a receivables module and self-service lodgers' tax payment portal for the Tyler MUNIS system; being a one-time appropriation, this amount was no longer needed in FY27.

Fire Department

1. ***Elephant in the room is obviously conversations around MIH, specifically ARU. I know this is a larger conversation and my opinion is the Governing Body is going to have to make a more explicit policy decision. However, for the budget I would like to understand:***
    - **What is the current staffing level and staffing profile (i.e. how many case managers, EMTs, admins, etc.) assigned to ARU with this budget?** 9 positions are currently within that division: 6 Case Managers, 2 Case Manager Supervisors, 1 Behavioral Health Specialist. **How tied are those assignments to the budget**? They all fall within Fire's position listing.

    - **How does this compare to the original launch of the ARU?** Please see below. The staffing levels at Alternative Response Unit have fluctuated over time. Staff are analyzing the needs and will be discussing this program with city administration in the coming months.

    - **What does this mean for the operation of the ARU?** Operations have not changed. **What can the ARU do or not do independently?** They continue to do the same thing they have been doing the last few years. **And how is this different than the original ARU operations?** All positions have become fully funded compared to in the past when they were grant funded.

2. ***The CHS Director funding stayed in Fire – where is it now?*** This position is still within the Fire Department position listing. We hope to evaluate this in the coming months.

3. ***What is included for a staff member to be "fully trained'?*** This means receiving all continuing education hours required by ISO and within our own standards.

4. ***Legislative facilities improvements funds – where are these going?*** Funds are going to needed for fire facility improvements at the various stations. Nearly every fire facility will be improved in some way through these capital outlay funds. We are well on our way to having all this money spent.

5. ***What is categorized as an "emergency" call? How many emergency vs. non-emergency calls does the department respond to annually?*** The budget is not dependent on how many calls we run. If this question is in reference to our goal of Maintaining a First-Rate Emergency Response and Readiness along with its objectives and KPIs, we are tracking responses to critical incidents.

6. ***Parking lot – would love to get presentations on: formalized quality assurance and improvement process for EMS; tactical paramedic program; joint Fire/PD drone program; wildfire preparedness (getting a lot of questions about this from residents right now)*** We would be happy to give presentations on any of the topics listed.

7. ***How much more funding is needed to expand Police/Fire drone program?*** Several hundred thousand to just over a million. Is this one-time or reoccurring funds that are needed? It is both one-time and reoccurring.

8. ***Large increase in contractuals and utilities – why?*** This is due to increases in service contracts with existing providers. These are obligated by the contracts that were entered into from previous years and we are still within those contract periods. Many services raise rates each year when a contract is in place. It is not uncommon to see a contract go up each year, and these escalations are typically known when the contract is signed and put in place the first year.

9. ***Big increase in other operating costs – why and what is included here?*** Increase in operating costs have significantly gone up from vendors we purchase from, such as the cost for oxygen tubing, IV supplies, other ambulance supplies, lifesaving medications, and even tires and filters for the ambulances and fire trucks have doubled in the last 8 months or so.

General Government-*Governing Body*

1. **$37,500 – participatory budgeting, how will this be used? Is it for allocation or for the outreach processes or both?** Funds are budgeted for FY27 for a more robust process. This is TBD and could be used for software, planning/consulting, etc.

2. ***What three positions are in Mayor's office – Mayor, Admin Assistant, and Rod's position (whatever it's called)?*** The Mayor's Office staff includes the Mayor, Executive Assistant, Senior Advisor /Public Engagement Coordinator. The latter is currently vacant and is part of

the staffing analysis that city administration is conducting to respond to evolving needs and the recent citywide reorganization.

3. ***Where are we with the Council staffing study?*** The study is wrapping up, and the draft report should be issued within the next few weeks. We plan to have the consultant present on this at the first or second Governing Body meeting in June. As position details or plans were not available when the budget was developed, $250k was included in the proposed City Council budget in contract services. This can be moved to positions should council determine it would like to move in that direction.

General Government-City Manager

1. ***5.27 FTE in CM's office – what is the position that is the split position and split with which other department?*** The full-time budgeted positions in CM office are: City Manager, Deputy City Manager, Executive Assistant, Communications Director, and the Diversity Equity and Inclusion Manager. The DEI manager is on hold pending analysis of needs and proper location in the city. The Equity and ADA Manager, Daniel Lopez, is partially funded at 0.27 FTE from CM and the remainder is budgeted within Public Works.

2. ***$200k for special projects – more information? I believe we had this last year as well – do we have information on how that was spent?*** At times the CM's budget is utilized for special projects or one-time items that arise that have not been captured or budgeted elsewhere. Aside from typical contracted services in the CM office such as internal audit projects, professional services are needed for lobbying/legislative liaison, special projects (e.g. soldier's monument feasibility report) and analysis. Small capital or other maintenance needs may also arise that require a quick response. For example, $5k was drawn to use for bike racks around town. This had not been budgeted elsewhere. The Charter Commission needed $10k for budget this year for stenography, supplies, etc. that had not been budgeted. At times, unforeseen items arise during the year, and this can serve as a contingency, if needed.

3. ***What are the 5.27 positions? Is the CM's office going to get more support via this budget?*** Please see above. We are evaluating the needs of the CM and Mayor's Office within the proposed budget and may make some recommended adjustments in the coming months.

General Government-Risk Management and Safety

1. ***Director Position vacant – is Andrea overseeing this department right now?*** Yes, Deputy City Manager Phillips oversees the Risk and Safety Division, which reports directly to the City Manager's Office, with assistance from Melanie Lovato, Risk Analyst, who manages the division's day-to-day and operational activities, including current safety duties and compliance efforts. A key priority within the division is evaluating staffing needs and reviewing job descriptions to ensure the organization is appropriately structured to support both risk management and safety functions. Six full-time equivalent (FTE) positions are budgeted for FY26. budgeted for FY26.

2. ***What is the division of activities between Risk Management versus Safety?***
   Risk Management and Safety functions are currently managed collaboratively by a small team consisting of a Risk Analyst, Administrative Assistant, and Worker's Compensation Manager. Staff have worked diligently to maintain continuity of both programs while supporting the city's operational needs. The city also partners with a third-party administrator to manage claims processing and workers' compensation administration, while our insurance broker, Arthur J. Gallagher & Co., assists in maintaining appropriate insurance coverage across the city's various lines of business.

   At present, responsibilities for risk management and safety are shared among existing staff. Risk Management activities primarily focus on claims oversight, insurance coordination, workers' compensation administration, and organizational risk mitigation. Safety-related efforts include supporting compliance initiatives, promoting safe work practices, and addressing operational safety concerns across departments.
   Ideally, the city would have dedicated safety specialists to provide more comprehensive and proactive safety support citywide. Staff are currently evaluating the organizational structure, job descriptions, and staffing needs to better define roles and determine how best to support both the Risk Management and Safety functions moving forward.

Human Resources

1. ***What outside contracts are HR currently using that will be less necessary with full implementation of Tyler HCM? Will this help with making the hiring process more efficient?*** HR currently utilizes ITT's outside contract with CiberPathway to rely on contracted subject matter experts to execute essential HR functions such as mass employee salary change imports, mass position changes, benefit rate changes, and module expansions. Our goal with the requested Human Resources Information Systems (HRIS) Manager is for HR to become independent from contractors, have the freedom to work directly with Tyler to make necessary changes to our Human Capital Management (HCM) system, and reduce the overall amount of funds the City is currently allocating to contracted work. We anticipate this position assisting in making the hiring process more efficient by focusing on expanding modules such as Recruiting, Employee Tasks and Training, as well as improving the public-facing applications system.

2. ***Like the idea of the mentorship program!*** Thank you! We are excited to work with the collective bargaining units on this initiative.

3. ***Do we not have a comprehensive city-wide training policy in place already?*** As of May 1, 2026, Human Resources has implemented a comprehensive Training Policy which clearly outlines training requirements and expectations for all levels of City employees. Prior to the implementation of our new Training Administrative Policy, the city lacked procedures to support Rule 11 of the Rules and Regulations. The implementation of this policy is a huge step forward for holding employees and managers accountable with not only their Human Resources required trainings, but Safety Trainings as well.

ITT

1. ***44.9 FTE – which position is split funded and with what department?*** It is a IT Systems Administrator, the other 10% is paid by Public Utilities/Utility Customer Service

2. ***What is the process for approving new platforms or programs requested by departments? What happens if there is a difference of opinion between ITT and a department?***

    - The process for approving new software or technology platforms begins with ITT's e-review process. Departments submit requests to ITT for review, and vendors are asked to complete a questionnaire related to cybersecurity, compliance, and technical requirements.
    - The purpose of the review is to identify and reduce cybersecurity and compliance risks while ensuring the proposed solution can integrate and operate effectively within the City's existing technology environment. ITT's role is not to decide which software is "better," but to ensure the solution meets the City's security, interoperability, and operational standards
    - If concerns are identified during the review, ITT works with the department and vendor to address and mitigate those issues. If significant risks or concerns remain unresolved, they may be elevated to the City Manager's Office for further review and direction.
    - ITT is also in the process of establishing a formal IT Governance structure to ensure key stakeholders are involved in technology procurement and enterprise application decisions. IT governance helps ensure the City's technology systems are managed consistently, securely, and strategically. It also provides oversight for system changes, integrations, data management, security, compliance, and the prioritization of technology resources across the organization.

3. ***Bike rack – are we developing AI policies for the City?*** ITT has developed an AI usage policy. It needs to be approved by the City Manager.

4. ***Page 73 "Division services are meticulously designed to align with the City's strategic vision, ensuring harmonious integration of IT initiatives." What is the City's strategic vision. Bike rack again, but I think I need to better understand where we are with ITT and where we are trying to go.*** To date, the strategic goal has been to improve process efficiency across departments. ITT is working with departments to identify operational challenges, review existing workflows, reduce duplicate efforts, and better leverage current technology solutions.

5. ***How many of our platforms do we build in-house as opposed to purchasing software from outside companies?*** ITT does not develop platforms or software internally. Software as a Service (SaaS) solutions, or cloud services provide a more scalable, faster deployment, lower infrastructure costs compared to on-prem platforms or internally developed solutions.

6. ***Large increase in budgets for Enterprise Application Services and Infrastructure Services Divisions – what are those increased attributed to?*** In EAS, it's $2.7M for

Microsoft 365 Licenses. In Infrastructure Svcs, it's mostly for ongoing Kronos/MUNIS project services moved to the operating budget because it's not really appropriate to charge the ERP capital project as done previously; also for data storage (~$500K) and projects management (~$780K)

7. ***Very large increase in Contractuals and Utilities – what is that attributed to? How does it impact department operations and services?*** See 6. above – those Infrastructure Services increases are in contractuals.

8. ***Large increases in supplies and capital purchases categories – what are these attributed to and what is the difference in this department? Is supplies the computer and network hardware purchases and replacements? Would this line item include the supplies needed for the new FTEs being added Citywide?*** The supplies increases are mostly for the Microsoft 365 licenses in EAS (software subscriptions are considered a supplies line item) – there are increases associated with software for new FTEs, but it's not a lot of $. In capital, the increase is for the Mayor/CM-approved penetration testing and the anticipated increases for Broadcom system management software licensing and support

FY27 Proposed Budget Q and A (May 11, 2026)—sent out to GB on 05/11/2026

Councilors have posed the following questions to date. Answers are being provided for all. Please let us know if you have more questions as you review the document.

On pg 4 it says annual revenues not including transfers are $433m, and the operating budget is $521m. On page 12 it says total revenues are estimated at $513m. My questions:

- ***What are these transfers in and how are they $80m?*** Transfers include allocating funds for debt service, subsidies to non-self-supporting funds, and utilities administration, customer service and conservation and sustainability divisions. Full schedule of transfers can be made available.

- ***If total revenue is $513 and operating budged is $521…aren't we $8m short?*** The proposed budget is a balanced budget. Among the resources used to fund the budget are available cash reserves from funds that are able to support it.

Pg 8 mentioned "citywide housing planning services." What is that?
Affordable Housing Division proposed budget includes funds to conduct a housing strategic plan. Faviola Chavez: Annually the OAH must complete an Annual Action Plan report to HUD outlining future initiatives for Community Development Block Grants (CDBG). Annually HUD requires OAH to complete Consolidated Annual Performance and Evaluation Report (CAPER). In addition to these annual reporting requirements, OAH must complete a Housing Strategy, and a Consolidated Plan which is completed for Community Development Block Grants (CDBG) every 5 years see link here: OAH_Five_Year_Strategy_Plan_-_COSF.pdf and Report P1 These reports are created by HUD Planning service contract experts.

Pg 16 has a 26.5% increase in Contractual Services, but I thought we were decreasing contractors.
Contractual services were decreased in FY26 to fund the citywide class and compensation study recommended employee cost of living increases. That funding was restored in FY27. The city is targeting key areas (such as park maintenance) to transition away from contracted maintenance and bring work in-house through city employees. Most contracts are going up due to inflation. The city is seeing this in goods and services, gasoline, utilities and other needs. The city will always need some contractors for some services as these may be specialized or more efficient services.

Pg 16 has funds for capital purchases and land & buildings. Do we have/can we use those funds to purchase new property? What are they used for?
These are "roll-up" categories of expenditures. Capital Purchases is budgeted at $12.6 million and include vehicles, equipment and IT equipment, and some facility remodeling costs. Land and Buildings are budgeted at $3,589,693. The city is working on a more robust capital planning and budgeting framework, that will include preventive maintenance, replacements and more. While the city is budgeting for some capital needs/equipment in the operating budget, this is not full representation of the capital needs or budget. The proposed budget includes funds for strategic reserves for fleet replacement, facilities and capital needs.

Pg 16 What are the $78m of transfers outgoing to? It is close to but not equal to transfers in, is that a coincidence?

Please see response above for explanation of major transfer categories. Transfers are balanced but they are not equal. $79,070,300 is the estimated transfers in and transfers out is $78,759,460. We did not include Buckman or SWAMA expense but did include the transfer in for the debt service on the Buckman Direct Diversion solarization project because the debt service budget must be balanced.

Pg 19 what are the $9m of reimbursed expenses?

These are general fund services assessments for Human resources, payroll, facilities, community engagement and Finance to non-general depts/other funds (e.g. utilities, tourism).

Pg 18 vs 22 – how is it decided which part of the budget for each department comes from all funds vs general fund?

This determination is based on how the service is provided, any restrictions on funding sources, and fund availability. For example, utilities are typically set up as enterprise funds where customer service charges/fees largely support the department's operations and capital needs. Many of the city's revenue sources are restricted by state (or more often local) laws/ordinances. Services that are not supported by direct charges (e.g. police, fire, economic development, affordable housing), etc. As the resource picture evolves over time, the Budget Office team rebalances the funds as appropriate.

General Question

1. ***In the "summary by fund" sections of the department summary pages, it lists all kinds of funds like community development and Santa Fe health/dental and lodgers' tax. Is there somewhere we can see how big those funds are? I see revenues by category on pages 14-15 but that isn't quite the same. Is there something I'm missing? Is that information somewhere else?***

   Please see attached a summary of all funds that shows revenues in and expenditures by fund.

Police Department

1. ***What is required for accreditation with the Municipal League? What is the benefit and impact for our department?***
    - We will need funding to pay for accreditation process. Fees cover the cost of travel for the accreditation staff to conduct audit of policies and practices.
    - May need to pay for PowerDMS subscription to develop and update policies. This would be a best practice because PowerDMS will flag changes in laws or practices and provides a recommendation on policy to be in compliance with the change. Also has audit capability to track changes over the years and document when policies were reviewed by staff to ensure compliance and understanding.
    - We are now in a good position to begin this process; we have a Sergeant assigned to Planning and Accreditation Section so they can focus on completing this process. The Planning and Accreditation Section in 2004 had a Lieutenant, a Sergeant and an admin assistant when our policy went through the largest updating process. By 2006 the positions had been reassigned in the department due to other staffing needs. It is imperative that we maintain staff in this assignment to complete the necessary work that is assigned to the Planning and Accreditation Section.
    - The benefit of achieving accreditation is the department demonstrates that an outside organization has validated that we have best practices and policies. This is helpful from a risk management perspective to minimize the potential for liability. It also builds trust and confidence in our community that our department is evolving and up to date with the manner we provide police services.
    - The process may take 1-2 years once we get started.

2. ***What is the cost to staff each of these 41 events? Does funding come from City or event organizers or both?***
    - If these are our annual events that we provide dedicated law enforcement services, it will be dependent on a few things. Some city hosted events such as Zozobra, Fiestas, and Indigenous Peoples Day are not billed to the event organizer. For these events, the sheer number of attendees requires large staffing numbers by the police department to ensure public safety. This funding is derived from our overtime budget.
    - Other events may be billed to the event organizer; some may have a lower rate if a councilor utilizes their waiver of fees for events requested by the event organizer. Some of the costs are recouped through billing of dedicated services. (Each councilor is permitted to request the waiver of fees for 1 event per councilor per year). Most event organizers opt to contract with a private security company to save costs.
    - Unplanned events that require police resources are facilitated by our overtime budget and by using on-duty staff. This usually occurs when a First Amendment Assembly event or Protest event occurs.

3. ***Amazing job on vacancy rates! What are the thoughts on the staffing levels of PD now that we are seeing lower vacancies? Do we have the right number of FTEs in the right areas?***
    - We are seeing improvements in response times with the increased staff levels, and staff that have been selected for assignments to the Traffic Unit, DWI Unit, and

Criminal Investigations Section have been able to transfer to their new roles. These specialists help address workload our field personnel usually respond to, but these specialists have a higher level of skill and proficiency.

- Although we are nearly fully staffed with our budgeted positions, SFPD is at a point where we need to expand the number of FTEs throughout our organization. The City of Santa Fe has grown significantly since the number of current allocated police officers, a growth in population size of approximately 30,000 people and an increase in workload in the form of calls for service. Despite this growth and increased workload, our staffing numbers have remained unchanged. A workload assessment in 2022 reported that SFPD provides a higher level of service for a community our size vs. other cities across the county. An internal analysis was conducted in 2018, using 2017 call data, and found that we needed additional police officer and sergeant positions to account for the workload at that time. We are budgeted for 169 police officers, from cadet to Chief of Police, and we would need approximately 205-210 police officers to effectively handle the current workload and have the capability for officers in the field to also engage in proactive community policing efforts (relationship building, crime prevention, traffic enforcement and education, business and neighborhood patrols, etc.).

4. ***Wonderful goals for response times and averages – what is the spread that we see for response times?***
    - Priority 1 Call Response Times – **Is a 2-officer response, and may need additional resources**
        1. 7:13 minutes 1st Quarter FY26
        2. 7:26 minutes 2nd Quarter FY26
        3. 6:39 minutes 3rd Quarter FY26
    - Priority 2 Call Response Times – **In most cases is a 2-officer response**
        1. 7:35 minutes 1st Quarter FY26
        2. 8:27 minutes 2nd Quarter FY26
        3. 6:23 minutes 3rd Quarter FY26
    - Priority 3 Call Response Times - **In some cases, Priority 3 Calls can be handled by a single officer resource which can be more readily available vs. 2-officer resources**
        1. 8:39 minutes 1st Quarter FY26
        2. 7:20 minutes 2nd Quarter FY26
        3. 5:19 minutes 3rd Quarter FY26

***These improved response times in 3rd Quarter are directly connected to our increased staffing levels and reduction in vacant police officer positions.

5. ***How can the City ensure dispatchers are evaluating calls in real-time and deploying officers in a timely manner as the RECC is under the County? What levers can we pull if this is not occurring to our standards?***
    - A solution exists in expanding our Axon Ecosystem. **Prepared 911** is a module we have requested to include in our Drone as a First Responder package to send call data to a Real Time Operations Center where a crime analyst or drone pilot can see a real time narration of a call as it is coming in to triage a call, get critical information before it is data entered into the Computer Aided Dispatch system and an officer is

assigned the call. In an emergency or during a priority call, this allows the deployment of a DFR drone that could be on scene before the call is dispatch to an officer in the field. This also helps the workflow for dispatch staff, especially for calls where a community member is non-english speaking; it translates a number of languages instantly vs. several minutes through a "language line". https://www.prepared911.com/

- We currently have monthly meetings to address concerns, when errors are identified we have clear lines of communication.
- The Santa Fe Chief of Police is a board member on the Regional Emergency Communications Center (RECC) Board. This is also an avenue to address any quality control issues and to ensure deliverables of the Joint Powers Agreement are being provided.

6. ***Do we currently have a 100% compliance rate for completing discovery requests in seven days? How long have we been at that level of compliance?***
    - 97% compliance for 1st quarter FY26
    - 85% compliance in 2nd quarter FY26 *** Addition of 2 Discovery Positions in Records, have been undergoing training to take on responsibilities. The staff member assigned to handle discoveries has been both assisting with handling discoveries and training new staff in workflow.
    - 57% compliance in 3rd quarter FY26 *** Addition of 2 Discovery Positions in Records, have been undergoing training to take on responsibilities. The staff member assigned to handle discoveries has been both assisting with handling discoveries and training new staff on workflow, but the new staff members have been taking on more responsibility leading the effort to complete this assignment. We anticipate seeing this improve as our new staff become more proficient.

7. ***Are there other technologies that the department is exploring at this time?***
    - Drone as a First Responder and expansion of technology solutions through Axon to enhance the productivity and safety of our field personnel. This includes integration of Smart911 to quickly get information to officers in the field as a community member contacts Dispatch **before** the call is entered into the CAD manually by the call taker, saving critical minutes and minimizing the chance of details being missed during the data entry process. https://www.prepared911.com/
        1. Also, a language translator that is integrated into their body worn camera to assist with communicating with people in need of assistance, including emergency situations. https://www.axon.com/products/real-time-translation
        2. We also want to integrate public and commercial video camera feeds to provide real time information to responding officers when responding to a report of a crime or to follow up during the investigation of the process. I am monitoring the development of a Public Records production platform that Axon is working on currently. https://www.axon.com/products/axon-fusus
        3. This may help the department with tracking and fulfilling IPRA requests. The majority of them are bodycam and dashcam footage.

- We are deploying Shotspotter technology, we will use data from pilot program to see the benefits of the technology. We will be evaluating funding to continue use after pilot program.
- The Regional Emergency Communications Center (RECC) Board has been researching and evaluating a Computer Aided Dispatch (CAD) system that will include modern features that can integrate with our Axon Ecosystem, Smart 911 platforms, and modern communications devices used by members of the community. This CAD system will be a cost sharing with the partner agencies (Santa Fe Police, Santa Fe Fire, Santa Fe County Sheriff's Office, Santa Fe County Fire, and Edgewood Police Department).
- As we launch automated speed and sound enforcement, we can evaluate if automated enforcement for red light and stop sign violations should also be considered (will need amendment of STOP Ordinance to include this ability).

8. ***Large increase in other operating costs – what does this include?***
    - This is phase 1 of the radio upgrade ($800k). This will replace handheld radios used by field personnel that are nearing or are at end of life for use.
    - The other factor is technology (laptops in vehicles, desktops, display screens, etc.), subscriptions and services (cellular phones, modems, etc.) that was funded in the ITT Department to provide support for PD's technology needs. The funding has now been placed in PD's budget. This is approximately $1.2 million to maintain the current services.

Metropolitan Redevelopment Authority

1. ***Would like to hear more about the design team for Fogelson – what funding do we currently have for this project and how far will it get us?***
   We assembled a design-build team composed of world-renowned architect, Richard Kennedy, local architects - Autotroph Design, and General Contractor Jaynes Corp to work on the two-phase effort to reopening the Fogelson Library. The MRA allocated 2.8 million dollars from one-time funding as of fiscal year 2025 to this contract; this funding will allow us to establish fire code compliance along with early accessibility infrastructure. The secondary phase will include the modernization and intense community outreach to turn Fogelson Library into a branch of the Santa Fe Library division if not the main library.

2. ***What is the benefit to getting buildings on the National and State Historic Registers? I fully support doing so even if it's just a title, but would like to understand what protections/restrictions come with that, how that might impact plans for Midtown, and if there are any financial opportunities that may come with it?***
   The pursuit of a designation on the national register demonstrates the City's commitment to the iconic Phillippe Register buildings including the Fogelson Complex, the Greer Garson Theater, and Administration building. In addition, it will allow the City and potential, future developers to pursue Federal Historic Tax Credits during the renovation of these structures.

3. ***Do we have a timeline for the completion/implementation of the plans mentioned on page 75-76***
   There were quite a few plans and projects mentioned across pages 75-76; to name a couple with their affiliated completion date - infrastructure design is expected to be complete by

the end of October 2026, the Hopewell Mann Neighborhood Stabilization plan will be as of May 31st, 2026, while the Greer Garson Feasibility Study and Master Plan amendments are both complete.

4. ***Why are we freezing the MRA Director position? What would it mean for the budget to unfreeze the position?*** The Director position was last funded at $174,512. See below.

5. ***I think this is an important position given where we are in this project. Why is an admin manager and a project manager being proposed instead of a director and maybe one of those positions?***
   This agency has been underfunded since its creation, with over half of previous FY budgets dedicated to full-time staffing and further supplemented by temporary contractors. Across the various initiatives with the legacy buildings, infrastructure design, proposed development, and compliance tracking for existing development, this agency needs additional staff that can handle the day to day. As a standalone agency, we must be able to pursue contracts, process invoices and collaborate effectively with other City divisions and our proposed developers.

6. ***Infrastructure estimates seem to go up every year and I imagine this trend will continue – what will we be able to do this year to start making a dent in this?***
   City staff are meeting with the Midtown infrastructure design team and Midtown development partners to chart a path forward to prioritize ongoing development and the continued disposition of land. The city is analyzing options to fund this going forward. A GRT bond could be considered for the implementation of the horizontal infrastructure, specifically Phase 1, which includes the right-of-way infrastructure and utilities necessary to begin vertical construction. Phasing of the project may be required.

7. ***What services will the general contractor perform and how is this contract different than our project management contract with WSP? Do we still have the contract with WSP?***
   WSP is currently an owner's representative that helps the City interface with Midtown development interests including developers, utility companies, and intragovernmental agencies while designing Midtown infrastructure. General contractors are those who will help us build out the Midtown infrastructure and renovate or existing legacy buildings. The City of Santa Fe is currently a subcontractor development market that requires a General Contractor to coordinate specialized trades coordinate implementation.

Planning and Land Use

1. ***City Smart – this pulls data from multiple departments and projects from other departments yet is housed in Land Use – are there resources allocated to assist with keeping information up to date? Is there a process set for how to update information on there and ensure it's accurate?*** It's GIS, which I know is used in ITT, so is ITT providing any support? There are resources allocated to maintaining the platform going forward. Once we upload the data (which includes archives for permits, development approvals, and

others) we will be adding information in real time as we receive applications. There can be a direct connection to our OpenGov platform because it has GIS functionality. Our ITT GIS team has been involved in the development of the platform. City Smart is hosted as part of our current GIS platform: https://city-of-santa-fe-nm-thecitydifferent.hub.arcgis.com/.

Relative to initiatives from other departments outside of the data provided as part of the citywide GIS updates, we would rely on them to provide us with the information. Typically, it is as simple as adding a link on the homepage, as we have done with the Airport Master Plan process. Our staff will coordinate with other departments on their initiatives, and we as Land Use staff will be updating the website regularly, in coordination with our ITT team.

2. ***Green Code – still in legislative services and CAO – is July 2026 a reasonable expectation for passage at this point?*** The Governing Body may be able to pass this legislation by the end of the calendar year. Much will depend on issues that staff has identified being adequately addressed.

3. ***Remind me the projected additional taxes we expect to collect through STRs because of the Neumo implementation?*** We are receiving Lodger's taxes through Neumo. Based on an existing City practice, those STRs that are exclusively rented through AirBnB and VRBO use their platforms for payment of Lodger's Taxes to the City. To date we don't have specific data on the amount of Lodger's taxes that have been collected. Prior to the implementation of Neumo, there was no strong tracking mechanism for the collection of Lodger's taxes. By being part of one platform, there is direct tracking between the rental dates and revenue collected. This increases accountability for short-term rental owners for the reporting of income and payment of Lodger's taxes.

4. ***Budget only increased by $1.6M but we moved an entire division (albeit a small division) – were there cuts to the original Planning and Land Use Department that are not as clearly outlined because of this move?***
Andy Hopkins: No. Both Affordable Housing and Land Use's separate budgets increased. Most of the increase was in Land Use, but it is after all a larger Department.
PLU: The increases largely center around salary, some minor reclassifications with little budget impact, and operations budgets including contracts. There is no net increase to the budgeted contract amount.

   The only additional staff approved was the unfreezing of the Engineer position. We still have a deficit of 3 other positions (which were frozen at the beginning of Fiscal Year 2026). No new positions were approved in response to requests for additional positions including an additional staff person in Code Enforcement for the short-term rental team (it is currently a team of 1) and a Department ombudsman, which would help usher people through the development processes (a concierge position which has been requested by the community for many years as recommended through our Development Manual project). The team recommended many more positions, but unfreezing the construction inspector, plumbing inspector, and Plans Examiner II positions would help with departmental operations. We have been able to reclassify several positions as we prepare for e-review. Several positions directly manage plan review – the management of paper plans – which can be retooled. We have received approval for reclassification of the

building permit technician positions to building permit specialist positions. Two current Land Use employees have already been promoted to the building permit specialist position, and another one was promoted from the Historic Preservation Division to building permit specialist to assist with the Building Division's plan intake.

Based on funding provided through grants and other affordable housing funds, including CDBG, an additional project manager position was created. This has no impact on the General Fund. Another affordable housing position was reclassified from Senior Planner to Contracts Administrator (which is in a lower pay range) due to the existence of Land Use's long range planning team and the ability to provide support on long-range planning efforts associated with affordable housing.

Contracts? In the department highlights, it would be helpful to see what highlights are the original Planning and Land Use and which are Affordable Housing.

For Planning and Land Use, the contracts are for technical assistance for our terrain management team, the General Plan Update, the Land Development Code Update, and the Development Manual and other smaller contracts to assist in managing permit and development review processes. If we are able to hire for the engineer position, the need for the Terrain Management contract would disappear.

As the department reorganization wasn't complete by the drafting of the budget, Affordable Housing information is presented separately this year. Please refer to that section for additional detail.

5. ***Previously frozen engineer position – if I am recalling correctly, this had been frozen because we couldn't fill it. What has changed to help us fill this position? I'm guessing the work was being performed by contracts – if so, will those contracts still be in place until we fill the position?*** The position was unfrozen as part of the budget review process. Hiring an engineer would ultimately save money on contracts. The reason for some Land Use contracts is that we cannot compete with private sector wages but still need to get the work done. While the comp and class study did a lot toward addressing salary needs, some positions are still underpaid.

6. ***How will Affordable Housing being in Planning and Land Use serve both those departments better?*** *Faviola Chavez:* The Affordable Housing Dept has already experienced significant benefits from this integration into Land Use. Coordination between departments has improved efficiency, particularly in streamlining Planning Commission requirements related to Affordable Housing Agreements.

   Additionally, the Office of Affordable Housing (OAH) is now able to work more proactively with affordable housing developers to identify planning-approved design concepts early in the development process. This collaboration helps ensure projects align with planning expectations, reduces potential delays, and creates a clearer path forward for project approvals and development timelines.

7. ***Have we allocated enough in this budget to complete Code Update and GP Update?*** Sufficient budget has been allocated for the projects, but there will be no contingency in case there is a desire to further investigate specific issues. For instance, if the implementation plan identifies a need for additional research and engagement, there is no budget to do so.

8. ***Really love seeing all the cross-departmental collaboration being done in all the various codes/guides/plans.*** Thank you, we do too! It is critical that we work together to provide the best service to the community. Partnerships are important.

9. ***Timeline for full e-review implementation – any updates?***

   We have been working with Finance and ITT with the need to build out an application programming interface (API) with Wells Fargo for payment processing. This would be required if we were to continue taking in-person payments at the cashier's office. We are working on implementation.

10. ***Review of land development workflows – bike rack, but very much looking forward to hearing about this a, the past four years as either Assistant Director or this happen sooner rather than later.*** At the last Governing Body meeting we presented in initial phase of the Development Manual project. Now the stakeholder portion of the project is complete, the consultant and staff will use the information to identify the common pinch points. Additionally, as we program and configure OpenGov permit and development review processes, we have identified efficiencies.

    A case in point is the Civil Engineering review of construction documents for infrastructure. Currently the review is run through a traditional building permit process. The infrastructure permits are proposed to be issued directly from Civil Engineering at the completion of the review process. This would reduce the permit timeline by a minimum of 3 weeks.

11. ***Bike rack – looking forward to learning more about all these studies and projects – how will they be presented to us?*** We are working with the Planning Commission and technical committees. As we have updates, we will make presentations to the Governing Body. Furthermore, we keep project statuses updated on the Santa Fe Forward and City Smart websites.

12. ***New staff in Affordable Housing – what will this mean for department function and outcomes? As the department transitions from primarily single-family construction projects to more complex multifamily development and construction, staffing needs and responsibilities have evolved accordingly.*** Faviola Chavez: To effectively manage these construction projects, staff will participate in monthly construction meetings, conduct onsite inspections, and provide ongoing project oversight throughout the development process.

This increased level of engagement will strengthen transparency, improve communication with project partners, and help identify potential delays or financing gaps early on reducing surprises and supporting more successful project outcomes.

13. ***Affordable housing – I am very interested in the City developing a funding mechanism and process to aggressively go after available properties that are vacant or suitable for redevelopment, both for housing and commercial. I would like to work with staff this fiscal year to achieve this.*** Faviola Chavez: Many municipalities utilize Community Development Block Grant (CDBG) funding to acquire and redevelop single-family properties. Under CDBG requirements, these projects are generally subject to an 8-year compliance period. Additionally, the Affordable Housing Trust Fund (AHTF) could potentially serve as a funding source for these acquisitions; however, doing so may limit our ability to provide assistance to non-partner organizations due to funding capacity constraints.

14. ***Large increase in Enforcement Division – what is this attributed to?*** Andy Hopkins: This will be the first year in which the Enforcement Division, recently split off from Inspections, was fully funded and 'stood up'. Much of the increase is offset by the reduction in Inspections, because the funding was moved. If you look at FY26 original budget for Enforcement, it's almost nothing, because none of the positions were moved until midyear FY26.

15. ***Hard to compare the budgets of Land Use and Affordable Housing to what they were last year as they are combined now – can you please provide comparisons of them separately and note what's changed?*** Andy Hopkins: The Affordable Housing change can be clearly seen in Dept. Expenditure Summary on p. 84 – see the "Summary by Division" section at the top (AFH is the 2nd line in the table). As for the rest of PLU, it went from $8,353,102 in original FY26 budget to $9,834,221 in FY27 proposed, an increase of $1,481,119 or 17.7%.

16. ***More info on balances in AHTF – what has been granted out? What has been spent/not spent of those grants?*** Faviola Chavez: Please note the expenditure for Civic Housing has been issued as of May 2026. Any unused funding at the end of the contract will be reverted back into the AHTF balance. The Estimated Excise Tax cannot be used until litigation is finalized.

Public Utilities

1. ***How does KSFB operate now that it is part of the Conservation and Sustainability Division? Still a nonprofit arm?***
   Same as before. Yes

2. ***ESD Admin and Maintenance Facility – where is this going to be located?***
   West of and adjacent to the existing Siler location, will access from Rufina.

3. ***Bike rack – the recycling center on Agua Fria I hear is much more user friendly and contains waste much better. However, I have been told it is not safe when exiting and***

trying to turn onto Agua Fria due to not being able to see oncoming traffic until already out in the road. Can we add one of those convex mirrors to help people see oncoming traffic? Or do something else to improve visibility?
Yes, this is a good idea and is being evaluated with Streets Division and Risk and Safety Division.

4. ***How able to achieve "significant reductions" in non-personnel budget for Wastewater Division? (page 92 in FY26 achievements)***
   Reductions in emergency spending at the WWTP as we have stabilized the treatment process there. The big changes here which sum to almost $7M in reductions are:
   - 2.1M reduction in repair and maintenance of buildings/structures
   - 1.8M reduction in repair and maintenance of system equipment
   - 375k reduction in operating supplies
   - 625k reduction in lease fees to airport
   - 1.7M reduction in equipment and machinery >5k
   - 175k reduction in vehicles

5. ***$2.5M for contracted support related to UCS Billing system upgrade – please tell me this is the last year for this contract! Do we anticipate using all of it? Please remind me why we still need this at this time? Is it with the same vendor? I see a goal to implement new system by October 2026 – so will we need contract after that? If not, why $2.5M in FY27?***
   We are on schedule to be transitioned to ADVANCED Billing by the fall, but we already have scoped as phase 2 to that transition for enhancements that have been identified as important but can't be implemented until after go-live (e.g. new water rate structure). Of the 2.5, 1.5 is for ADVANCED, down from 1.7M this year, and including annual licensing fees, and 1M is for ITT Connect, down from 2.5M this year, so we are winding this transition down, but need to assure that we budget enough to be successful.

6. ***Goal to completely eliminate all regulatory compliance violations – how many do we have at this point? What are they?***
   They remain mostly wastewater related, and although the e coli that we hear so much about is largely under control, we still get exceedances for nutrients and other parameters on some days. We are focused on addressing these with a comprehensive upgrade or replacement of the plant.

7. ***Goal to purify wastewater into safe drinking water source? Tell me more…***
   The goal is "turn" wastewater into potable water and the way to do it is indirect exchange with the San Juan Chama return flow project. Apologies for not catching this incorrect edit of our submitted content.

8. ***What is included in previous years of Conservation & Sustainability on the Expenditures Summary Chart if we are just creating this division? Are FY23/24 and FY25/26 showing a combo of water conservation and KSFB budgets?***
   They are historical expenses from Water Conservation and KSFB but include some personnel expenses in the Water Division outside of the new division, so not really apples

to apples. When summing up all activities across divisions, the new Division was created largely within the existing budget, however there are some startup costs and overhead costs associated with the new building being set up for this division that result in an expansion in budget to the overall PUD budget in 2027. This increase is estimated at $500k one time and $50k per year ongoing.

9. ***(There is) a 50% decrease in repairs and maintenance-why?***
   See answer to #4 above which identifies about $4M in decreases to repairs and maintenance in wastewater. We invested heavily to stabilize the treatment process at the WWTP and are winding that back down as we prepare for a significant longer-term investment in a major overhaul or new plant.

10. ***52% increase in insurance – what is that attributed to?***
    This was due to large damage claims in ESD ($502,876) and WW – ($458,326). Claims incurred in the prior year are assessed to the Departments where the claim is attributed in the following year's budget. These can be quite variable so may go down next year.

PUBLIC WORKS

1. ***Capital budgeting process – I know we've discussed this quite a bit, but will we be doing any semblance of a separate capital budget process this year?***

   Yes. Public Works is currently in the planning and development phase of advancing a more formal citywide capital planning and budgeting process. We have already begun developing a framework intended to better connect long-range infrastructure needs, financial capacity, prioritization, and annual implementation and budgeting decisions. The goal is to move beyond a project-by-project approach and toward a more structured system that includes a long-range capital vision, financial planning, and a prioritized multi-year capital program. This work will require coordination with Finance, the City Manager's Office, departments citywide, and the Governing Body. While this effort is still being developed, we expect to begin laying the foundation for a more robust, transparent, and repeatable capital budgeting process this year.

2. ***I would like to see a goal of this department to start the process towards creating an overall capital plan and implementing a more in-depth capital budgeting process with the Councilors***

   Agreed. Public Works sees this as an important long-term goal and believes the City would benefit from a more coordinated and transparent capital planning process. Our intent is to move toward a framework that connects asset condition, service delivery needs, financial capacity, operational impacts, and Council priorities into one decision-making structure. That process should create clearer visibility into needs and tradeoffs while providing a stronger basis for prioritization and investment decisions. We also agree that Governing Body involvement should be built into the process rather than occurring only at the end of annual budget development. We will incorporate this concept into our FY27 Goals, Objectives, and Key Performance Indicators.

3. ***Is there anywhere we can see a list of all the capital, facility, and infrastructure projects completed this year? I think it would be good for the community to see that there is progress being made here. I do not need this for budget hearings, this can be a request for the future. Maybe a presentation in a couple months?***

   Not currently in a single public-facing format, although information exists across multiple systems and divisions. We agree that creating a consolidated and accessible view of completed and active projects would be valuable for the Governing Body, the public, funding agencies, and staff. Public Works is already moving in this direction through more centralized project tracking in tools such as Asana, AssetPlanner, OpenGov, and related systems. We are also advancing development of a more public-facing capital projects dashboard intended to provide clearer visibility into project locations, status, schedules, funding, asset conditions, and construction or maintenance activity. We will work with the team to develop a FY26 summary presentation for the Governing Body and then evaluate establishing a more regular reporting cadence and dashboard structure moving forward. This aligns with our broader goal of making Public Works more organized, transparent, and accountable.

4. **When will the asset management tools be fully implemented and what will it mean for operations and services? (Page 99)**

   The asset management system within Facilities Management is currently implemented for Facilities-operated assets, and we are working to expand that portfolio to include additional City facilities. Complete Streets and Parks and Open Space are coordinating with Public Utilities to implement OpenGov/Cartegraph service request and asset management modules. Service request functionality is anticipated to be operational by the end of FY27, while asset management capabilities will continue maturing as inventory development, field data collection, and system integration progress. This work is not simply about deploying software; it is intended to create more disciplined work management, improve visibility into asset condition and maintenance needs, and support better operational and capital decision-making over time.

5. **Might be a bike rack, but want to hear more about the coordinated approach to infrastructure investment (last bullet page 100)**

   Historically, infrastructure investments have often been planned and tracked independently within individual programs or divisions. Our goal is to move Public Works toward a more organized, systematic, and transparent operating model supported by stronger capital planning and better project visibility. Tools such as Asana, AssetPlanner, OpenGov, and related systems are part of that effort because they help us better track projects, asset condition, work activity, funding, timing, and delivery status. The broader goal is to connect these tools to a more robust capital planning approach so we can evaluate infrastructure needs and investments across streets, sidewalks, drainage, parks, facilities, parking, transit, and utilities as part of one larger interconnected system. Over time, this should improve coordination, reduce duplication, identify conflicts earlier, support better

investment decisions, and provide clearer information to leadership, Council, and the public.

6. **What is the Resource Conservation Fund and why is there a 100% decrease this year in this budget?**

   The Resource Conservation Fund is associated with the Citywide Solar and Streetlight Program and is used to support streetlight-related maintenance and associated activities. During budget review, staff identified the proposed reduction as an error and have indicated that it will be corrected. This does not reflect a policy decision to eliminate the fund or reduce the underlying service. The issue is administrative in nature and does not represent a planned operational change.

Public Works-Parks

Regarding the reduction in contracts/addition of one more parks crew:

1. ***What contracts are being phased out in order to fund this crew?***

   Currently, this transition focuses on the medians crew and encampment cleanup crews. It does not eliminate all contracts, planned reduction is $200K in contracted services at this time. The goal is to ensure this initial transition is successful and then gradually convert additional contracted crews to internal staff over time.

2. ***How much is left in contracts for Parks, and what will these contracts be used for?***

   The total remaining contract budget is $1,537,475. This covers porta-potty rentals, large tree removal, plumbing, traffic control, fireworks, and other professional and specialty services. Of that amount, $788,750 is currently allocated for median maintenance and encampment cleanup, which is targeted for future transition to internal crews.

3. ***How will this impact level-of-service scores?***

   We have set our target for Parks and Medians to remain at 50% of assets achieving a Level of Service rating of 2.5 during this transition period.

4. ***How will this impact the Parks SWAT team (I believe they call it PAC)?***

   We will maintain the PAC crew but not expand it. The PAC crew has been very successful in improving our level of service.

5. ***We have traditionally had a challenging time hiring staff. Will contracts be kept in place until we are sufficiently staffed to actually transition?***

   Yes, this has been the case in the past, but economic conditions have shifted. We will continue to monitor the situation and report to leadership if we encounter difficulties.

6. ***I would like to propose that we fund a new parks crew, but also keep contracts whole for this fiscal year. How much would we need to find to do that (looking at the budget book, I believe $200K), and where are potential places we can get that money?***

Generally, a new labor crew currently costs approximately $615K for a 7-person crew and $465K for a 5-person crew. This does not include equipment costs, which typically range from $200K to $250K.

7. ***What park improvement projects/upgrades are scheduled for this year? Specifically interested in:***
   Please note most of these are capital funding not part of the operational budget.
   - SWAN (specifically the water feature) Staff is recommending that we begin with infrastructure improvements, which will utilize all currently available funding. Based on community demand, staff is recommending the water feature as the first priority.
   - Herb Martinez Park —Capital funding is anticipated in Fall 2027, at which time design work will begin. The tot lot is expected to be completed by the end of this fiscal year.
   - Additional phases for Pueblos del Sol Park – The swings are expected to be installed and the project completed by the end of this fiscal year.
   - Upgrades to Franklin E. Miles Park in preparation for the Fourth of July – Extra watering, site clearing, and increased maintenance to support event services.
   - Ragle Park ball fields – We received $750,000 for the conversion of an additional smaller field to artificial turf.
   - MRC Soccer Valley – Design is progressing well. We are currently at the 30% design phase and anticipate bringing the championship field recommendation to the Governing Body for approval by July.

Santa Fe Airport

1. ***What is the Passenger Facility Charge and how will it generate more revenue*.** The fee is added to the price of the airline ticket and can be used for projects such as: Building or improving terminals, adding gates, improving baggage systems, reducing noise around airports, and enhancing safety or security infrastructure.

2. ***Excited about updates to parking. Is there a shuttle for late night so individuals can safely get to their cars?*** Shuttle is running when aircraft are coming in and arriving no matter what time.

3. ***What are the baggage handling improvements***? Not sure what this is referring to but with Phase two there will be carousels for bags next to arrivals, as well as an inline baggage system to handle and sort.

4. ***Reason for reclass of shuttle driver to security?*** Budget decrease and federal requirements for more security. We have enough shuttle drivers for our plane loads and the security team has been acting as shuttle drivers as we need more and this is adding to their patrols.

Tourism

(Typo in budget book – Randy is permanent director for tourism, not interim for airport-noted thank you!)

1. ***Bullet points on lodger tax on bottom of 108 and top of 109 contradict each other – which is accurate?*** The bullet point on page 108 indicating over $17.5 million in lodger's tax is the correct statement. Andy Hopkins – I apologize, this was an oversight, and will be removed from the final Adopted Budget Book.

2. ***What is the marketing strategy this year given uncertainty in economy, cost of airfare, and cost of gas? Have we seen shifts in where people are visiting from? Do we shift our marketing to more heavily target those areas or continue to broaden and why?*** We are not adjusting our strategy at this point as it already focuses primarily on the regional market where we have the most success. Unlike some other destinations, for the first 4 months of calendar year 2026, we have not seen any decrease in visitation and feel that the response to our current plan shows that it is effective. We will closely monitor this and pivot to other stratigies if necessary. The FY27 plan includes an additional $1 million dollars that will go a long way in helping avoid any decline in visitation caused by the economy or spending concerns out of our control.

3. ***Do we always provide funding for the 4th?*** Lodger's Tax does not. This is a one-time expenditure in support of the 250th celebration. We have been successful in getting $50,000 in support from the County and are hopeful that the state will also participate with funding, reducing the obligation on Lodger's Tax.

4. ***What will the Assistant Operations Manager bring to the Convention Center operations and users?*** Additional coverage during events that often require changes and decisions that are beyond the scope of responsibility of our excellent convention specialist team. It will allow us to be more responsive to immediate client needs and provide better support to the team.

5. ***More info on second floor terrace renovation:*** We are completing design of a plan to remove several planters on a portion of the terrace and cover over 2,000 square feet to make it more usable. We will also install an exterior stairway to properly connect the second floor space to the courtyard, allowing them to be used concurrently by the same group. Design is currently in review by the Historic Land Use team.

6. ***How is the Tourism department supporting homelessness efforts? What is considered highly touristed area – only downtown or the growing area around Meow Wolf, which brings in a lot of tourists?*** We have $500k budgeted to continue a reduced scope of private security, planned on the basis of increased police presence in the historic district. There is no plan for support outside of this area. While hotels are located in this area, it is not a primary tourism destination outside of the Meow Wolf area.

7. ***Why 288.3% increase in supplies?*** Supplies includes software subscriptions. Lodger's Tax is paying the added annual cost of $515k for the NEUMO software being used by Land Use and Finance for the management, enforcement and lodger's tax collections related to short term rentals. We also have two new pieces of software (Mindtrip) budgeted to provide AI capabilities to our visitor website and expanded on visitation to the city with Placer AI.

Executive Summary/General Questions and Comments

1. ***Projected revenues are less than proposed expenditures – where are we making up the gap? How much are we taking out of reserves and what will be in reserves for FY27 – will it be more than what we require of ourselves or equal to what we require?*** Please see response to similar question above.

2. ***Eager to learn more about proposals for more revenue streams – when will we get this information?*** Staff have been working with departments identifying opportunities for new and additional revenue streams. We hope to present this information to Governing Body in a study session in July/August.

3. ***I would love to see how this budget aligns with goals and specific KPIs per department – I know this is new for the City but I think it is important we continue to highlight it and be specific so we can continue to grow this practice.*** We will send the dashboard with data through Q3 2026. Departments have identified goals, objectives and KPIs.

4. ***$40.6M proposed over FY26 original budget – how far over the FY26 actual (or projected actual) is this? Where is all this additional money coming from? We've been warned about revenues leveling off for the last few years. Thankfully, we've been doing well overall, but I still want to be cautious. How much of this additional money is in theory reoccurring?*** Expenditures are driven by salary increases, new positions and position changes and inflation. Contractual services include major projects and core services such as housing inmates at the jail, Fire ASPP program, and the land use code update and General Plan. On the revenue side, the proposed budget assumes a $31 million increase

from all funds. Projections for GRT and lodging tax were developed in collaboration with Dr. Reilly White, a local economist. We will continue to monitor GRT and other major revenue sources monthly. We anticipate GRT increasing by roughly 6.7% in FY27 over this year.

5. ***More information about the strategic reserves and capital reserve please. This is the operating budget, but I would expect these to be more part of a capital budgeting process – is that what would happen in other communities that have a more established capital budget? What are we going to be able to do this year to move us closer to that?*** City Manager's Office and Public Works Director, Capital Projects Manager and other staff are developing a more holistic framework for a planning process that addresses preventive maintenance. More information on this is forthcoming. Staff hope to develop a more comprehensive, longer-term capital plan that is more inclusive of needs citywide and contemplates regular inventory. Most communities have a multi-year capital plan, and each year adopt a Capital Budget that identifies the projects to be addressed that year along with identified resources to pay for them. The ICIP is a subset of the citywide capital plan. The proposed budget includes strategic reserves for key capital needs, fleet replacement and facilities reserves.

6. ***I think it would be helpful for new and old councilors and public to understand some of our different revenue streams, where they come from and how much of the percentages we receive (ie GRT vs. property, etc.) and how those are or are not restricted.*** Staff will be prepared to speak to this. The Gross Receipts Tax is our biggest revenue source for the General Fund. This may be a good topic for the July/August study session on revenue options as it may be larger topic than we have time for in the budget hearings.

7. ***Transfers In/Transfers Out – what do these include?***
   Please see responses above.

8. ***I'm trying to understand the Position Count chart – if I add up the new FTEs in FY26 and FY27 I am seeing 43 new FTEs that have been created since FY26 original budget. Are the FY26 new FTEs being created right now or were they created earlier in the FY26 year? How are they being funded?***
   At times changes in FTEs/positions do occur throughout the fiscal year as conditions shift. Some positions were reclassifications, others were transfers, and some were "unfrozen" throughout the year as vacancy savings were realized. The net increase between the original FTE count in FY26 was 15 positions (FY26-- 1,628.5 FTE in FY26 compared to the FTE count of 1,643.5 in FY27). Budget office staff will be available at the hearings to discuss this in more detail as needed.

9. ***Some of the new FTEs being proposed are for positions we have historically had a hard time filling. Have we seen a shift in employment trends that make us believe this will no longer be the case? Park maintenance workers we historically had a challenge filling. If we are funding some these positions by cutting contracts that typically did this work, will we still have the contracts in place until the positions are filled to ensure the work is still being completed in the interim? For frozen but unfunded positions, will we be advertising for them and finding funding if we find the right candidate? I'll put specific position questions in with their departments.***

Noted. Some positions have been challenging to fill for a wide variety of reasons. We will be prepared to discuss this in department budget hearings.