



<b>ACTION SHEET</b> <b>CITY COUNCIL COMMITTEE MEETING OF 07/09/14</b> <b>ITEM FROM FINANCE COMMITTEE MEETING OF 06/30/14</b>
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**ISSUE:**

8. Request for Approval of Professional Services Agreement – Conduct Pre-Placement Physicals and/or Medical Exams for Candidates Selected for Positions within the City of Santa Fe (RFP #14/27/P); Joshua Brown, MD; IMS Practice Management Group, LLC. (Sandra Perez)

**FINANCE COMMITTEE ACTION: APPROVED AS CONSENT ITEM**

Requested approval of professional services agreement to conduct pre-placement physicals and/or medical exams for candidates selected for positions within the City of Santa Fe (RFP #14/27/P) with Joshua Brown, MD, IMS Practice management Group, LLC in the amount not to exceed \$200,000 plus gross receipts tax. Budget is available in risk management fund.

**SPECIAL CONDITIONS OR AMENDMENTS**

**STAFF FOLLOW-UP:**

VOTE	FOR	AGAINST	ABSTAIN
COUNCILOR TRUJILLO	Excused		
COUNCILOR RIVERA	X		
COUNCILOR LINDELL	Excused		
COUNCILOR MAESTAS	X		
CHAIRPERSON DOMINGUEZ	X		

3-17/14/FCMissue

# City of Santa Fe, New Mexico

# memo

**DATE:** June 19, 2014

**TO:** Finance Committee

**FROM:** Robert Rodarte, Purchasing Officer  
Purchasing Division

**VIA:** Marcos A. Tapia, Finance Director  
Finance Department

**ISSUE:** Award of Request for Proposal # '14/27/P  
Conduct Pre-Placement Physicals and/or Medical Exams

**SUMMARY:**

On March 12, 2014, three proposals were received for the above referenced service as follows:

	Written Score	Interview Score
IMS Practice Management Group, LLC, Santa Fe	1100	1750
Concentra, Santa Fe	825	1000
Spine Solutions, Santa Fe	500	

The evaluation criteria consisted of work plan (50%); pertinent experience of vendor and staff expertise (25%); and cost (25%). The proposal was reviewed and evaluated by Robert Rodarte, Purchasing, Debbie Rouse, Risk and Safety, Sandra Perez and Jennie Salazar, Human Resource.

The using department has reviewed the proposals and recommends award to IMS Practice Management Group, LLC, Santa Fe in the amount of \$50,000.00 annually for a four year term.

Budget will be available each fiscal year in account number 62102.510300 (Risk Management – Professional Services).

**ACTION:**

It is requested that this recommendation of award to IMS Practice Management Group, Santa Fe in the amount of \$50,000.00 annually for a four year term be reviewed, approved and submitted to the City Council for its consideration.

Attachment(s):

1. Memo of recommendation from the using department.
2. A copy of the professional service agreement.
3. A copy of tabulation score sheet.

EVALUATION SCORES

'14/27/P

CONDUCT PRE-PLACEMENT PHYSICALS AND/OR MEDICAL EXAMS

Evaluation Committee	Written Evaluation		
	Concentra	IMS Practice Management Group, LLC	Spine Solutions
Debbie Rouse	350	300	200
Sandra Perez	375	250	100
Jennie Salazar	375	275	200
<b>Total Score</b>	<b>1100</b>	<b>825</b>	<b>500</b>

Evaluation Committee	Interview Evaluation	
	IMS Practice Management Group, LLC	Concentra
Robert Rodarte	450	350
Debbie Rouse	475	325
Sandra Perez	450	225
Jennie Salazar	375	200
<b>Total Score</b>	<b>1750</b>	<b>1100</b>

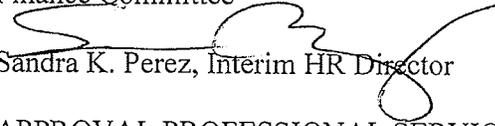
# City of Santa Fe, New Mexico

# memo

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DATE: June 19, 2014

TO: Finance Committee

FROM:   
Sandra K. Perez, Interim HR Director

RE: APPROVAL PROFESSIONAL SERVICES AGREEMENT  
Joshua Brown, MD; IMS Practice Management Group, LLC

## **BACKGROUND AND SUMMARY:**

Responses to Request for Proposal (RFP) #14/27/P were received on March 12, 2014. The RFP was issued for the purpose of procuring professional services to "Conduct Pre-Placement Physicals and/or Medical Exams" for candidates selected for positions within the City of Santa Fe.

Of the three (3) submittals Dr. Joshua Brown, MD; IMS Practice Management Group, LLC on March 12, 2014 was chosen as the successful vendor. Dr. Brown's scope of services and cost of services were more competitive than the other two (2) vendors. The selection process followed all procurement rules/regulations and was handled under the direction of Robert Rodarte, Purchasing Agent. A site visit to confirm the information in the proposal as well as meetings with the staff were conducted and proved successful.

## **REQUEST ACTION**

I hereby request your approval of the four (4) year Professional Services Agreement with Dr. Joshua Brown, MD; IMS Practice Management Group, LLC, to be paid out of Business Unit 62102.510300.

CITY OF SANTA FE  
PROFESSIONAL SERVICES AGREEMENT

THIS AGREEMENT is made and entered into by and between the City of Santa Fe (the "City") and Joshua Brown, MD; IMS Practice Management Group, LLC (the "Contractor"). The date of this Agreement shall be the date when it is executed by the City and the Contractor, whichever occurs last.

1. SCOPE OF SERVICES

The Contractor shall provide the following services for the City:

A.

Conduct pre-placement physicals to include testing for the following medical and physical requirements as required by the job descriptions. Tests subject to change as job requirements change. (Job requirements shall be provided by the City of Santa Fe to identify essential lifting and physical requirements prior to or at the time of the test):

Strength and Muscular Endurance Testing – 1 R.M.

- |                    |  |
|--------------------|--|
| Light Physical 1.  | Lifting Requirements Minimum of 10 lbs.  |
| Light Physical 2.  | Lifting Requirements Minimum of 20 lbs.  |
| Medium Physical 1. | Lifting Requirements Minimum of 40 lbs.  |
| Medium Physical 2. | Lifting Requirements Minimum of 60 lbs.  |
| Heavy Physical 1.  | Lifting Requirements Minimum of 80 lbs.  |
| Heavy Physical 2.  | Lifting Requirements Minimum of 100 lbs. |

One Repetition Maximum Lift Test (1 R.M.) 30 min.  
(One Lift Depending on the Job Requirement Questionnaire)

This test measures infrequent or occasional lift capacity. It determines the maximum weight an individual is capable of lifting in frequent or occasional lift capacity. It determines the maximum weight an individual is capable of lifting in three tasks:  
(Depending on job description Questionnaire)

- Floor Level (floor to waist)
- Waist to Chest Level
- Chest to Above Shoulder Level

B.

Medical Physicals: All medical physicals will include the following in addition to any extra job specific requirements:

- Abdomen
- Blood Pressure
- Build
- Coordination Tremor
- Ears, Nose, Throat
- Eyes
- Glucose
- Heart
- Height
- Hernia
- Lungs
- Medical History
- Muscle
- Ocular Motility
- Pulse
- Pupils
- Reflexes
- Skeletal System
- Spine
- Strength of Range of Movements
- Superficial Lymph Nodes
- Thorax
- UA Dipstick
- Weight (slender, medium, heavy, or obese)

C.

Additional testing for:

Police Cadet/Lateral Hires:

- Anabolic steroid level
- Audiogram
- ALT with interpretation
- Blood count with differential
- CBC (complete blood count with differential)
- Chem 20 (blood chemistry work up)
- Chest x-ray is required if evidence of tuberculosis exists

- EKG with interpretation
- Hepatitis B Vaccine with series of shots OR
- Hepatitis B Surface Antibody
- PPD TB
- RPR
- Serum lipids (cholesterol, HDL, triglycerides)
- SMA-12
- Sodium Triglycerides, GGT
- T-4 (thyroid function)
- TSH (thyroid stimulating)
- Urine Analysis
- Vision titmus/color perception (uncorrected, corrected: far, near, left and right)

Firefighter Pre-employment:

- Lift Assessment
- EKG Resting
- Pulmonary Function Test
- Audiogram
- Hepatitis B Vaccine with series of shots OR
- Hepatitis B Surface Antibody
- MRO
- TB Skin Test
- Gen Hlth Pnl (Chem 23, CBC, UA)
- RPR (Syphilis Test)
- Thyroid Panel

DOT Preplace Physical

- Dot Physical
- MRO
- Regulated Drug Screen
- Lift Assessment

Preplace /Adapt SWM Equipment Operator

- DOT Physical
- MRO
- Regulated Drug Screen
- HPE ADAot-Level2

Preplace/Adapt PX SWM Maintenance Worker

- Physical Exam
- HPE ADApt-Level2

D.

Other services to be provided include:

1. Pre-placement physicals shall be offered in Santa Fe, New Mexico and may occur at any facility that the Contractor may have with the same or less pricing.
2. The Contractor shall provide pre-placement physicals within three working days when requested by the City of Santa Fe. The Contractor's business hours shall be available Monday through Friday, 8:00 a.m. to 5:00 p.m. (excluding holidays, as identified by the Contractor) and any other hours that the Contractor can provide.
3. The Contractor shall report the results of the medical exams to the Human Resources Department at the City of Santa Fe following one workday after the physical exam, and in two workdays if x-rays and blood work are required. Written documentation shall follow within one week of the day of the exam.
4. The documentation shall consist of specific requests on each of the tested items, and recommendations on fitness for duty based on job duties. (The City of Santa Fe shall provide the Contractor with requirements defining the job duties and physical requirements prior to or at the time of testing.)
5. Under the Americans with Disabilities Act (ADA) guidelines, medical facilities are allowed to release job specific information to the employer. The Contractor shall complete and remit an agreed upon medical report form to the City of Santa Fe of each prospective employee examined.

2. STANDARD OF PERFORMANCE; LICENSES

A. The Contractor represents that it possesses the personnel, experience and knowledge necessary to perform the services described under this Agreement.

B. The Contractor agrees to obtain and maintain throughout the term of this Agreement, 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 rendered, a sum not to exceed two hundred thousand dollars (\$200,000.00), plus gross receipts taxes.

B. The Contractor shall be responsible for payment of gross receipts taxes levied by the State of New Mexico on the sums paid under this Agreement.

C. Payment shall be made upon receipt, approval and acceptance by the City of detailed statements containing a report of services completed. Compensation shall be paid only for services actually performed and accepted by the City.

4. APPROPRIATIONS

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

5. TERM AND EFFECTIVE DATE

This Agreement shall be effective when signed by the City and the Contractor, whichever occurs last, and shall terminate on June 30, 2018 unless sooner pursuant to Article 6 below.

6. TERMINATION

A. This Agreement may be terminated by the City upon 30 days written notice to the Contractor.

(1) The Contractor shall render a final report of the services performed up to the date of termination and shall turn over to the City original copies of all work product, research or papers prepared under this Agreement.

(2) Compensation is not based upon hourly rates for services rendered, therefore the City shall pay the Contractor for the reasonable value of services satisfactorily performed through the date Contractor receives notice of such termination, and for which compensation has not already been paid.

7. STATUS OF CONTRACTOR; RESPONSIBILITY FOR PAYMENT OF EMPLOYEES AND SUBCONTRACTORS

A. 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 Agreement.

B. Contractor shall be solely responsible for payment of wages, salaries and benefits to any and all employees or subcontractors retained by Contractor in the performance of the services under this Agreement.

C. The Contractor shall comply with City of Santa Fe Minimum Wage, Article 28-1-SFCC 1987, as well as any subsequent changes to such article throughout the term of this Agreement.

8. CONFIDENTIALITY

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

9. CONFLICT OF INTEREST

The Contractor warrants that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of services required under this Agreement. Contractor further agrees that in the performance of this Agreement no persons having any such interests shall be employed.

10. ASSIGNMENT; SUBCONTRACTING

The Contractor shall not assign or transfer any rights, privileges, obligations or other interest under this Agreement, including any claims for money due, without the prior written consent of the City. The Contractor shall not subcontract any portion of the services to be performed under this Agreement without the prior written approval of the City.

11. RELEASE

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

12. INSURANCE

A. The Contractor, at its own cost and expense, shall carry and maintain in full force and effect during the term of this Agreement, comprehensive general liability insurance covering bodily injury and property damage liability, in a form

and with an insurance company acceptable to the City, with limits of coverage in the maximum amount which the City could be held liable under the New Mexico Tort Claims Act for each person injured and for each accident resulting in damage to property. Such insurance shall provide that the City is named as an additional insured and that the City is notified no less than 30 days in advance of cancellation for any reason. The Contractor shall furnish the City with a copy of a Certificate of Insurance as a condition prior to performing services under this Agreement.

B. Contractor shall also obtain and maintain Workers' Compensation insurance, required by law, to provide coverage for Contractor's employees throughout the term of this Agreement. Contractor shall provide the City with evidence of its compliance with such requirement.

C. Contractor shall maintain professional liability insurance throughout the term of this Agreement 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 Agreement.

### 13. INDEMNIFICATION

The Contractor shall indemnify, hold harmless and defend the City from all losses, damages, claims or judgments, including payments of all attorneys' fees and costs on account of any suit, judgment, execution, claim, action or demand whatsoever arising from Contractor's performance under this Agreement as well as the performance of Contractor's employees, agents, representatives and subcontractors.

14. NEW MEXICO TORT CLAIMS ACT

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

15. THIRD PARTY BENEFICIARIES

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

16. RECORDS AND AUDIT

The Contractor shall maintain, throughout the term of this Agreement and for a period of three years thereafter, detailed records that indicate the date, time and nature of services rendered. These records shall be subject to inspection by the City, the Department of Finance and Administration, and the State Auditor. The City shall have the right to audit the billing both before and after payment. Payment under this Agreement shall not foreclose the right of the City to recover excessive or illegal payments.

17. APPLICABLE LAW; CHOICE OF LAW; VENUE

Contractor shall abide by all applicable federal and state laws and regulations, and all ordinances, rules and regulations of the City of Santa Fe. In any action, suit or legal dispute arising from this Agreement, the Contractor agrees that the

laws of the State of New Mexico shall govern. The parties agree that any action or suit arising from this Agreement shall be commenced in a federal or state court of competent jurisdiction in New Mexico. Any action or suit commenced in the courts of the State of New Mexico shall be brought in the First Judicial District Court.

18. AMENDMENT

This Agreement shall not be altered, changed or modified except by an amendment in writing executed by the parties hereto.

19. SCOPE OF AGREEMENT

This Agreement incorporates all the agreements, covenants, and understandings between the parties hereto concerning the services to be performed hereunder, and all such agreements, covenants and understandings have been merged into this Agreement. This Agreement expresses the entire Agreement and understanding between the parties with respect to said services. No prior agreement or understanding, verbal or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

20. NON-DISCRIMINATION

During the term of this Agreement, Contractor shall not discriminate against any employee or applicant for an employment position to be used in the performance of services by Contractor hereunder, on the basis of ethnicity, race, age, religion, creed, color, national origin, ancestry, sex, gender, sexual orientation, physical or mental disability, medical condition, or citizenship status.

21. SEVERABILITY

In case any one or more of the provisions contained in this Agreement or

any application thereof shall be invalid, illegal or unenforceable in any respect, the validity, legality, and enforceability of the remaining provisions contained herein and any other application thereof shall not in any way be affected or impaired thereby.

22. NOTICES

Any notices required to be given under this Agreement shall be in writing and served by personal delivery or by mail, postage prepaid, to the parties at the following addresses:

City of Santa Fe  
Sandi Perez  
Human Resources  
P.O. Box 909  
Santa Fe, NM 87504

Contractor  
Joshua Brown, MD  
IMS Practice Management Group, LLC  
1650 Hospital Drive, Suite 800  
Santa Fe, NM 87505

IN WITNESS WHEREOF, the parties have executed this Agreement on the date set forth below.

CITY OF SANTA FE:

\_\_\_\_\_  
JAVIER M. GONZALES, MAYOR

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

CONTRACTOR:  
IMS PRACTICE MANAGEMENT  
GROUP, LLC.

\_\_\_\_\_  
JOSHUA BROWN, MD

DATE: 6/17/2014

CRS# 03-114931-00-6  
City of Santa Fe Business  
Registration # 14-00018006

ATTEST:

\_\_\_\_\_  
YOLANDA Y. VIGIL  
CITY CLERK

APPROVED AS TO FORM:

Judith Brennan  
KELLEY A. BRENNAN, INTERIM CITY ATTORNEY *for* 5/18/14

APPROVED:

MARCOS A. TAPIA, FINANCE DIRECTOR

62102, 510300  
Business Unit Line Item

**Section K. Proof of Comprehensive General Liability insurance covering bodily property damage liability**

MARCH 10, 2014

Fire Policy Status

IMS PRACTICE MANAGEMENT GROUP B Ph. (505) 982-4276  
 LLC FIRE Policy: 91-BE-P387-9 F Yr issd: 2012  
 1650 HOSPITAL DR STE 800 Xref: 91-BC-P280-7 WC  
 SANTA FE NM 87505-4789 Location: 1650 HOSPITAL DR STE 800  
 SANTA FE NM 87505

Term: CONT  
 Type: BUSINESS-OFFICE BPC: Medical Office Policy  
 Coverage information

B-BUSN PROP 167400 Premium: 994.00 Renew date: OCT-09-14  
 LOSS INC 12 MONTH Written date: OCT-09-12

L-BUSN LIAB 1000000  
 GEN AGGREGT 2000000 Amount paid: 994.00  
 PCO AGGREGT 2000000 Date paid: OCT-11-13  
 M-MED/PERSON 5000 Bill to: INSD

Prev risk: 165,900 Prev prem: 1,192

Deductibles applied: 5000 ALL PER OTHER DED MAY APPLY

COVERAGE TITLES	LIMIT	DEDUCT
Arson Reward	\$5,000	\$0
Brands And Labels	\$25,000	\$5,000
Collapse	Included	\$5,000
Damage To Non-Owned Buildings From Theft, Burglary Or Robbery	Coverage B Limit	\$5,000
*Damage To Premises Rented To You	\$300,000	\$0
Debris Removal	25% of covered los	\$5,000
*Dependent Property - Loss Of Income	\$5,000	\$0
*Employee Dishonesty	\$10,000	\$250
Equipment Breakdown	Included	\$2,500
Fire Department Service Charge	\$5,000	\$0
Fire Extinguisher Systems Recharge Expense	\$5,000	\$0
Forgery Or Alteration	\$10,000	\$5,000
Glass Expenses	Included	\$5,000
Increased Cost Of Construction And Demolition	10%	\$5,000
Costs (applies only when buildings are insured on		
*Inland Marine - Computer Property	\$25,000	\$500

COVERAGE TITLES	LIMIT	DEDUCT
*Inland Marine - Computer Property Loss Of Income And Extra Expense	\$25,000	\$0
Money Orders And Counterfeit Money	\$1,000	\$5,000
Newly Acquired Business Personal Property (applies only if this policy provides Coverage B - Business	\$100,000	\$5,000
Newly Acquired Or Constructed Buildings (applies only if this policy provides Coverage A - Building	\$250,000	\$5,000
Ordinance Or Law - Equipment Coverage	Included	\$5,000
Personal Effects (applies only to those premises provided Coverage B - Business Personal Property)	\$5,000	\$5,000
*Personal Property Off Premises	\$15,000	\$5,000
Pollutant Clean Up And Removal	\$10,000	\$5,000
Preservation Of Property	30 Days	\$5,000
*Utility Interruption - Loss Of Income	\$10,000	\$0
Water Damage, Other Liquids, Powder Or Molten Material Damage	Included	\$5,000

LOCATION 001	LIMIT	DEDUCT
*Accounts Receivable	\$50,000	\$5,000
*Back-Up Of Sewer Or Drain	\$15,000	\$5,000
*Money And Securities (Off Premises)	\$5,000	\$250
*Money And Securities (On Premises)	\$10,000	\$250
*Outdoor Property	\$5,000	\$5,000
*Property Of Others (applies only to those premises provided Coverage B - Business Personal Property)	\$2,500	\$5,000
*Seasonal Increase - Business Personal Property	25%	\$5,000
*Signs	\$2,500	\$5,000
*Spoilage (applies only to those premises provided Coverage B - Business Personal Property)	\$20,000	\$5,000
*Valuable Papers And Records	\$50,000	\$5,000

PROPERTY LOCATIONS				LIABILITY		
LOC	CHPX	ADDRESS	PREMIUM	EXPOSURE	LIMIT	PREMIUM
001	STCLS	1650 HOSPITAL DR STE 800	599	SANTA FE NM 3550	07505 1000000	395
	838	167400				

Section L. Proof of workers Compensation insurance:

MARCH 10, 2014

Fire Policy Status

IMS PRACTICE MANAGEMENT  
GROUP LLC  
1650 HOSPITAL DR STE 800  
SANTA FE NM 87505-4789

B Ph. (505)982-4276  
FIRE Policy: 91-BC-P280-7 F Yr issd: 2007  
Xref: 91-BE-P387-9 OF

Location: 1650 HOSPITAL DR STE 800  
SANTA FE NM 875054789

Term: 1 YR PP

Type: WORKERS COMP  
Coverage information  
BI BY ACCIDENT /EACH  
ACCIDENT 100000

Premium: 2,592.00  
PREM REFUND 7283.00

Renew date: JUL-23-14  
Written date: JUL-20-07

BI BY DISEASE /EACH  
EMPLOYEE 100000

Amount paid: 408.00  
Date paid: NOV-07-13  
Bill to: INSD

End act: 07/23/13

BI BY DISEASE /PER  
POL LIMIT 500000

Prev prem: 0

Prev risk: 0

Deductibles applied:NONE

MARCH 10, 2014

Fire Policy Status

CLASS	COV AMT
8832	432000
9740	432000

INC/EXC	NAME	TITLE
EXCLUDED	ROBERT KOSSMAN	MEMBER
EXCLUDED	JOSHUA BROWN	MEMBER
EXCLUDED	MARK SEREDOWYCH	MEMBER
EXCLUDED	PAUL KOVNAT	MEMBER
EXCLUDED	GENTIANA VOINESCU	MEMBER
EXCLUDED	CHARNES SY CHIU	MEMBER



**City of Santa Fe  
Summary of Contracts, Agreements, & Amendments**

**Section to be completed by department for each contract or contract amendment**

1  ORIGINAL CONTRACT or CONTRACT AMENDMENT

2 Name of Contractor Joshua Brown, M.D.

3 Complete  information requested

Plus GRT

Original Contract Amount: \$200,000.00

Inclusive of GRT

Termination Date: June 30, 2018

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

or by City Manager Date: \_\_\_\_\_

Contract is for: Conduct Pre-Placement Physicals and/or Medical Exams for candidates for positions within the City of SF.

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

Increase/(Decrease) Amount \$ \_\_\_\_\_

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

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

or by City Manager Date: \_\_\_\_\_

Amendment is for:

4 History  Contract & Amendments: (option: attach spreadsheet if multiple amendments)

Plus GRT

Inclusive of GRT

Amount \$ \_\_\_\_\_ of original Contract# \_\_\_\_\_ Termination Date: \_\_\_\_\_

Reason: \_\_\_\_\_

Amount \$ \_\_\_\_\_ amendment # \_\_\_\_\_ Termination Date: \_\_\_\_\_

Reason: \_\_\_\_\_

Amount \$ \_\_\_\_\_ amendment # \_\_\_\_\_ Termination Date: \_\_\_\_\_

Reason: \_\_\_\_\_

Amount \$ \_\_\_\_\_ amendment # \_\_\_\_\_ Termination Date: \_\_\_\_\_

Reason: \_\_\_\_\_

Total of Original Contract plus all amendments: \$ \_\_\_\_\_



**City of Santa Fe  
Summary of Contracts, Agreements, & Amendments**

5 Procurement Method of Original Contract: (complete one of the lines)

RFP# 14/27/P Date: March 12, 2014

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

Sole Source \_\_\_\_\_ Date: \_\_\_\_\_

Other \_\_\_\_\_

6 Procurement History: Four year contract  
example: (First year of 4 year contract)

7 Funding Source: \_\_\_\_\_ BU/Line Item: 62104.510300.

8 Any out-of-the ordinary or unusual issues or concerns:  
\_\_\_\_\_  
(Memo may be attached to explain detail.)

9 Staff Contact who completed this form: Sandi Perez  
Phone # 955-6591

10  Certificate of Insurance attached. (if original Contract)

Submit to City Attorney for review/signature  
Forward to Finance Director for review/signature  
Return to originating Department for Committee(s) review or forward to City Manager for review and approval (depending on dollar level).

To be recorded by City Clerk:

Contract # \_\_\_\_\_

Date of contract Executed (i.e., signed by all parties): \_\_\_\_\_

Note: If further information needs to be included, attach a separate memo.

Comments: