

ACTION SHEET
CITY COUNCIL COMMITTEE MEETING OF 07/08/2015
ITEM FROM FINANCE COMMITTEE MEETING OF 06/29/2015

ISSUE:

11. Request for Approval of Professional Services Agreement – Conduct Water System Loss Audit Services for Water Division (RFP # 15/09/P); Daniel B. Stephens and Associates, Inc. (Andrew Erdman)

FINANCE COMMITTEE ACTION: APPROVED AS CONSENT ITEM

FUNDING SOURCE: 52361.510320

SPECIAL CONDITIONS OR AMENDMENTS

STAFF FOLLOW-UP:

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

06/29/2015

**ACTION SHEET
PUBLIC UTILITES COMMITTEE MEETING OF 6/3/15**

ISSUE NO. 13

Request for approval of RFP '15/09/P and award of proposal to Daniel B. Stephens & Associates, Inc. to provide a water loss audit for the total amount of \$127,976.00 (\$31,994.00 per fiscal year beginning FY 2015/2016) exclusive of NMGRT. (Bill Schneider)

Public Utilities Committee – 6/3/15
Finance Committee – 6/15/15
City Council – 6/24/15

PUBLIC UTILITES COMMITTEE ACTION: Approved to forward to 6/15/15 Finance Committee.

SPECIAL CONDITIONS OR AMENDMENTS:

STAFF FOLLOW UP:

VOTE:	FOR	AGAINST	ABSTAIN
COUNCILOR RIVERA, CHAIR	X		
COUNCILOR MAESTAS	X		
COUNCILOR BUSHEE	X		
COUNCILOR DIMAS	X		
COUNCILOR IVES	X		

CITY OF SANTA FE RFP PROCUREMENT CHECKLIST

Contractor Name: Daniel B. Stephens and Associates, Inc.
 Procurement Title: Water System Loss Audit
 Solicitation RFP#: RFP # 15/09/P
 Department Requesting/Staff Member: Water / Andrew Erdmann

Procurement Requirements:

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

REQUIRED DOCUMENTS FOR APPROVAL BY PURCHASING*

YES	N/A	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Procurement Checklist (by Purchasing)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Departments Recommendation of Award Memo addressed to Finance
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Tabulation Evaluation score sheet
<input type="checkbox"/>	<input checked="" type="checkbox"/>	BAR
<input type="checkbox"/>	<input checked="" type="checkbox"/>	FIR
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Contract, Agreement or Amendment
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Current Business Registration and CRS numbers on contract or agreement
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Summary of Contracts and Agreements form
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Certificate of Insurance
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other: _____

Andrew Erdmann
 Department Rep Printed Name and Title

[Signature]
 Department Rep Signature attesting that all information included

[Signature]
 Purchasing Officer attesting that all information is reviewed

REQUIRED DOCUMENTS FOR BID FILE*

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	Final RFP Document
<input type="checkbox"/>	<input type="checkbox"/>	Copy of legal solicitation published in the newspaper, website, etc.
<input type="checkbox"/>	<input type="checkbox"/>	All addendums
<input type="checkbox"/>	<input type="checkbox"/>	Plan holders list
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Copies of all RFP submittals
<input type="checkbox"/>	<input type="checkbox"/>	Complete evaluation score sheets
<input type="checkbox"/>	<input type="checkbox"/>	Non-Responsive/Non-Responsibility Form and correspondence or letters from Department to vendor regarding disqualifications
<input type="checkbox"/>	<input type="checkbox"/>	Oral presentations (sign-in sheets, presentation materials, etc.)

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Documentation sent to Proponents/Offerors and responses received regarding clarifications, decisions, negotiations, and/or best and final offers, etc. |
| <input type="checkbox"/> | <input type="checkbox"/> | Reference Reviews/Reference Check Questionnaires |
| <input type="checkbox"/> | <input type="checkbox"/> | Pricing evaluation |
| <input type="checkbox"/> | <input type="checkbox"/> | Final overall evaluation matrix or summary of evaluator scores |
| <input type="checkbox"/> | <input type="checkbox"/> | Other: _____ |

AWARD*

YES N/A

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Fully executed Memo to Committees from the Department with recommendation of award |
| <input type="checkbox"/> | <input type="checkbox"/> | Winning proposal (this is a copy that has all confidential/proprietary information excluded) |
| <input type="checkbox"/> | <input type="checkbox"/> | Contract Award Notice |
| <input type="checkbox"/> | <input type="checkbox"/> | Email or notification sent to all Proponent(s)/Offerors that award was made |
| <input type="checkbox"/> | <input type="checkbox"/> | Waiver or "No Action Taken" from Procurement Office |
| <input type="checkbox"/> | <input type="checkbox"/> | If IFB and not awarded to lowest responsive, responsible bidder; written explanation |
| <input type="checkbox"/> | <input type="checkbox"/> | Other: _____ |

DISCLOSURES*

YES N/A

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Contractor Disclosures & Conflicts of Interest |
| <input type="checkbox"/> | <input type="checkbox"/> | Disclosures & Conflicts of Interest Form(s) (winning proponent(s)/offeror(s)) |
| <input type="checkbox"/> | <input type="checkbox"/> | Contractor –Conflicts of Interest |
| <input type="checkbox"/> | <input type="checkbox"/> | Purchasing Office Letter or e-mail to designated individual regarding potential conflict |
| <input type="checkbox"/> | <input type="checkbox"/> | Conflict of Interest Form signed by all parties |
| <input type="checkbox"/> | <input type="checkbox"/> | Letter from Procurement Office regarding the potential conflict |
| <input type="checkbox"/> | <input type="checkbox"/> | Subcontractor Disclosures |
| <input type="checkbox"/> | <input type="checkbox"/> | Disclosures & Conflicts of Interest form of Subcontractor(s) |
| <input type="checkbox"/> | <input type="checkbox"/> | Subcontractor –Conflicts of Interest |
| <input type="checkbox"/> | <input type="checkbox"/> | Purchasing Officer Letter or email to designated individual regarding potential conflict |
| <input type="checkbox"/> | <input type="checkbox"/> | Conflict of Interest form signed by all parties |
| <input type="checkbox"/> | <input type="checkbox"/> | Letter from Legal Office regarding the potential conflict |
| <input type="checkbox"/> | <input type="checkbox"/> | Other: _____ |

CONTRACT*

YES N/A

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Copy of Executed Contract |
| <input type="checkbox"/> | <input type="checkbox"/> | Copy of all documentation presented to the Committees |
| <input type="checkbox"/> | <input type="checkbox"/> | Finalized Council Committee Minutes |
| <input type="checkbox"/> | <input type="checkbox"/> | Other: _____ |

MISCELLANEOUS FILE*

YES N/A

- | | | |
|--------------------------|--------------------------|---------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Local Preference Form |
| <input type="checkbox"/> | <input type="checkbox"/> | New Mexico Residence Form |
| <input type="checkbox"/> | <input type="checkbox"/> | Veterans Exemption |
| <input type="checkbox"/> | <input type="checkbox"/> | Other: _____ |

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

*

PROTEST (if applicable)*

YES N/A

Documentation from protester filed with the Purchasing Office

Letter from Department to Purchasing Office Providing response to protest

Letter from Purchasing Officer to protester and Department on final outcome

Other: _____

Create a separate file folder which may contain any documents with trade secrets or other competitively sensitive, confidential or proprietary information.

YES N/A

Original proposal (s) with no redactions

Department Rep Printed Name and Title

Department Rep Signature attesting that all information included

City of Santa Fe, New Mexico

memo

Date: May 19, 2015
To: Public Utilities Committee, Finance Committee, City Council
Through: Nick A. Schiavo, Public Utilities Department & Water Division Director *NSA*
From: Andrew Erdmann, Water Resources Coordinator *WRS & PAS*
Re: DBS&A, Inc. Contract for Water System Loss Audit Services

ITEM AND ISSUE:

The Water Resources and Conservation Section are requesting approval of a Professional Services Agreement (PSA) with Daniel B. Stephens and Associates (DBS&A) to conduct water system loss audit services at a cost of \$31,994 plus applicable gross receipt tax per fiscal year. The requested contract term is 4 years, expiring on 6/30/19. Water Loss Audits are requirements of the New Mexico Office of the State Engineer for permit compliance.

BACKGROUND AND SUMMARY:

The City of Santa Fe, Water Resources and Conservation Section is requesting approval for a PSA with DBS&A to enable the Water Division to conduct water system loss audits to identify and quantify water uses and losses, and identify tangible methods for minimizing non-revenue water. The audits will follow the International Water Association/American Water Works Association (IWA/AWWA) methodology. The intent is to first conduct a 2014 water audit that will provide a sound baseline analysis of the water system losses and data gaps, allowing the City to use as a benchmark for at least another subsequent audit that will be conducted following the launch of the new billing and automated metering systems which both may be contributing to non-revenue water losses. The contract term provides staff the flexibility to conduct up to 4 independent audits with continuity in format and quality. The total number based on findings and recommendations of the baseline and subsequent water loss audits.

The amount requested for this PSA each Fiscal Year is \$31,994 plus applicable gross receipt tax with a not to exceed total of \$127,976 plus applicable gross receipt tax. The fee schedule used for analytical pricing will be for FY 2015/16. Funding will be available in the Water Division Operating budget BU/LI #52361.510320.

ACTION REQUESTED:

Staff recommends approval of the requested PSA with Daniel B. Stephens and Associates (DBS&A) in the amount of \$31,994 plus applicable gross receipt tax per fiscal year and a not to exceed total of \$127,976 plus applicable gross receipt tax over the 4 year term.

Thank you for your consideration of this request.

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 Daniel B. Stephens & Associates, Inc. (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. The Contractor shall conduct a top down water audit for the City of Santa Fe to determine the percentages of revenue and non-revenue water in our system. The audit will be completed using the water accounting methods established by the International Water Association/American Water Works Association (IWA/AWWA) Water Balance Model. The water audit shall quantify the amount and sources for primary water loss and make recommendations for reducing such loss. The water audit report shall account for account for all categories in the audit with special consideration for fire, irrigation, residential, multi-family, and commercial uses. An annual water audit shall be conducted for the year 2014. Tasks are outlined as follows:

The tasks specified for the audit include:

1.) **Water System Review:** Work with various City departments to compile information about the City's water supply system, water use records and other data needed to complete a water audit (i.e. information regarding water meters or other measurement devices including locations, models, specifications, age, and accuracy testing methodology and schedules, among other details).

- 2.) **Pre-production/withdrawal data quality evaluation:** Establish metrics for data quality to confirm accuracy of treated water production data which includes establish accuracy of the City's treated water production meters. This will include review of existing testing methods and third party testing to confirm meter error adjustments. Please provide a separate cost for 3rd party testing of 10 meters.
- 3.) **End use data quality control and evaluation:** Analyze monthly utility billing and consumption data and summary reports combined with key components of the billing database and categorize end uses into billed metered, unbilled metered, billed unmetered, and unbilled unmetered amounts.
- 4.) **Water balance analysis:** Construct a water balance for revenue and non-revenue water utilizing the AWWA water audit methodology.
- 5.) **Non-revenue water review:** Develop a detailed assessment of non-revenue water use in the system including apparent water loss (water supply metering and consumption metering inaccuracies data handling errors) and real water loss (leaks, theft, etc.)
- 6.) **Data Validity Score:** The ranking of validity of the data provided by the City and the range of operational and financial performance indicators as calculated from the input data need to be evaluated and the findings presented in detail. Data Validity is a measure of the accuracy of the audit and published audits have shown to be most sensitive to Water Production Estimates, Billed Metered Consumption, and Customer Metering. Inaccuracies in these three inputs have been shown to more heavily skew accuracy of the Water Audit and attempts.
- 7.) **Actions Assessment:** Complete a review of recommended actions to reduce non-revenue water including recommendations identified from past water audit and establish controls to implement recommended actions.
- 8.) **Study report:** Complete a project report that presents descriptions of the water system, data, assumptions and methods used and calculations

made, data limitations and recommended action steps to minimize non-revenue water and implement water conservation, and discussion of the AWWA water audit methodology and software. Report format should be consistent with Water Audit Report for Gallup, NM (OSE, 2007).

9.) **Presentation:** Appear before the Public Utilities Committee , Finance Committee and City Council to present the findings of the agreed-upon procedures in summary and answer any questions asked by the Finance Committee.

2. STANDARD OF PERFORMANCE: LICENSES

A. The Contractor represents that it possesses the 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 one hundred twenty-seven thousand nine hundred seventy-six dollars (\$127,976) plus applicable gross receipts taxes. Payment shall be made as follows:

Fiscal Year 2015 – 2016, thirty one thousand nine hundred ninety four dollars (\$31,994) plus applicable gross receipts taxes

Fiscal Year 2016 – 2017, thirty one thousand nine hundred ninety four dollars (\$31,994) plus applicable gross receipts taxes

Fiscal Year 2017 – 2018 thirty one thousand nine hundred ninety four dollars (\$31,994) plus applicable gross receipts taxes

Fiscal Year 2018 – 2019, thirty one thousand nine hundred ninety four dollars (\$31,994) plus applicable gross receipts taxes

The total amount for the four (4) years will be for services rendered to the City.

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 and approval 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, 2019, unless sooner pursuant to Article 6 below. The term of this agreement shall not exceed four (4) years in accordance with the terms of this Agreement.

6. TERMINATION

A. This Agreement may be terminated by the City upon 10 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) If compensation is not based upon hourly rates for services rendered, 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.

(3) If compensation is based upon hourly rates and expenses, then Contractor shall be paid for services rendered and expenses incurred through the date Contractor receives notice of such termination.

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:
Water Division Director
Water Division
801 W. San Mateo
Santa Fe, NM 87504

Contractor:
Daniel B. Stephens & Associates, Inc.
6020 Academy Road NE, Suite 100
Albuquerque, NM 87109

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

CITY OF SANTA FE:

CONTRACTOR:

JAVIER M. GONZALES, MAYOR

NAME & TITLE

DATE: _____

DATE: _____

CRS #02-043602-005_
City of Santa Fe Business
Registration # 15-00112353

ATTEST:

YOLANDA Y. VIGIL
CITY CLERK

APPROVED AS TO FORM:

MDM 5/12
KELLEY A. BRENNAN, CITY ATTORNEY

APPROVED:

OSCAR RODRIGUEZ, FINANCE DEPARTMENT

52300.510320
Business Unit Line Item



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

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

1 **FOR: ORIGINAL CONTRACT** or **CONTRACT AMENDMENT**

2 Name of Contractor Daniel B. Stephens & Assoc.

3 Complete information requested Plus GRT
 Inclusive of GRT

Original Contract Amount: \$31,994.00

Termination Date: June 30, 2019

Approved by Council Date: Pending

or by City Manager Date: _____

Contract is for: Water System Audits yearly for 4 years

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 of Contract & Amendments:** (option: attach spreadsheet if multiple amendments) Plus GRT
 Inclusive of GRT

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

Reason: construction mngmt

Amount \$ _____ amendment # _____ Termination Date: _____

Reason: _____

Amount \$ _____ amendment # _____ Termination Date: _____

Reason: _____

Amount \$ _____ amendment # _____ Termination Date: _____

Reason: _____

Total of Original Contract plus all amendments: \$ 127,976



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

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

RFP# 15/09/P Date: March 2, 2015
 RFQ _____ Date: _____
 Sole Source _____ Date: _____
 Other _____

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

7 Funding Source: Water Division **BU/Line Item:** 52300.51032

8 Any out-of-the ordinary or unusual issues or concerns:
none
 (Memo may be attached to explain detail.)

9 Staff Contact who completed this form: Maya Martinez
 Phone # 955-4271

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:

Please obtain CAO signature and forward to Finance for signature thanks



City Of Santa Fe
PO BOX 909
Santa Fe NM, 87504

City of Santa Fe, New Mexico BUSINESS LICENSE

THIS BUSINESS IS IN COMPLIANCE WITH THE CITY OF SANTA FE LIVING WAGE ORDINANCE, §2A-1 SECC. 1987

Official Document
Please Post

Business Name: **DANIEL B STEPHENS & ASSOCIATES**

Location: **SF COUNTY**

Class: **BUSINESS REGISTRATION - STANDARD**

Comment:

Control Number: 0045852

License Number: 15-00112353

Issue Date December 30, 2014

Expiration Date December 31, 2015

DANIEL B STEPHENS & ASSOCIATES
6020 ACADEMY NE STE 100
ATTN: JUDY
ALBUQUERQUE NM 87109

THIS IS NOT A CONSTRUCTION PERMIT OR SIGN PERMIT. APPROPRIATE PERMITS MUST BE OBTAINED FROM THE CITY OF SANTA FE BUILDING PERMIT DIVISION PRIOR TO COMMENCEMENT OF ANY CONSTRUCTION OR THE INSTALLATION OF ANY EXTERIOR SIGN.

THIS REGISTRATION/LICENSE IS NOT TRANSFERABLE TO OTHER BUSINESSES OR PREMISES.

CRS # = 02-043602-005