



**ACTION SHEET**  
**CITY COUNCIL COMMITTEE MEETING OF 09/09/15**  
**ITEM FROM FINANCE COMMITTEE MEETING OF 08/31/15**

**ISSUE:**

12. Request for Approval of Professional Services Agreement – Study and Evaluation of City’s 50% Residential Impact Fee Reduction (Ordinance 2014-8); Duncan Associates, Inc. and Approval of Budget Increase in the Amount of \$7,500. (Reed Liming)

**FINANCE COMMITTEE ACTION:**

Approved as Consent item.

**FUNDING SOURCE: 12084.510340**

**SPECIAL CONDITIONS OR AMENDMENTS**

**STAFF FOLLOW-UP:**

<b>VOTE</b>	<b>FOR</b>	<b>AGAINST</b>	<b>ABSTAIN</b>
COUNCILOR TRUJILLO	X		
COUNCILOR RIVERA	X		
COUNCILOR LINDELL	Excused		
COUNCILOR MAESTAS	X		
CHAIRPERSON DOMINGUEZ			

4-13-15

# City of Santa Fe

## memo

DATE: For Finance Committee Meeting of August 31, 2015  
For City Council Meeting of September 9, 2015

TO: Finance Committee / Mayor & City Council

VIA: Kate Noble, Acting Director, Housing & Community Development Department *KN*

FROM: Reed Liming, Long Range Planning Division Director *RL*

SUBJECT: Professional Services Agreement (Duncan Associates); Review of 50% Residential Impact Fee Reduction (Ordinance 2014-8)

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### **BACKGROUND**

On February 26, 2014 the Santa Fe Governing Body adopted ordinance 2014-08 that set impact fees on all residential permits at 50% of the impact fee schedule rates. The 50% reduction has effective dates of February 27, 2014 through February 26, 2016. On February 27, 2016, unless re-authorized by ordinance, the fee reduction will “sunset” and residential permits will once again be charged 100% of the impact fee schedule rates.

Ordinance 2014-8 called for a review of the effect of the 50% reduction prior to City Council consideration of whether to continue the reduction in February 2016, or let the ordinance “sunset” and allow the residential impact fees to be re-set at the rates contained in the city’s impact fee rate table.

### **REQUEST**

To respond to Ordinance 2014-8 request to conduct a study, staff requests the approval of the use of \$7,500 from the “Road” Impact Fee Fund to contract with Duncan Associates (Austin, TX), the city’s impact fee consultant, to conduct a review and analysis of the city’s reduction in impact fees to determine the effects that the reduction might have had on the amount and types of residential construction and to compare Santa Fe’s residential construction levels in recent years with those of other regional cities, New Mexico and the United States.

On Thursday, August 13, 2015 the Capital Improvements Advisory Committee (CIAC) voted unanimously to allocate \$7,500 for a contract with Duncan Associates (Austin, TX) for this purpose. The CIAC also voted to approve the use of “Road” Impact Fee Funds, as this fund has nearly \$1.9 million available.

Attachments/  
Professional Services Agreement (draft)  
Budget Adjustment Request (draft)

Company	Business Unit	Object Account	Subsidiary	Account Description	Cumulative 13 Actual 2014
02720	2720	100700	07000	Cash due from Hub	1,623,803.92
02720	2720	110100		Interest Receivable	0.00
02720	2720	213550		Arterial	-12,000.00
02720	2720	301010		Fund Balance-Unreserved	-1,053,351.45
<b>Total Business Unit 2720</b>					<b>558,452.47</b>
02720	21720	430950		Roads Impact Fees	-553,939.38
02720	21720	470800		Gain on Sale - Investments	0.00
02720	21720	480020		Interest on Investments	-4,720.99
02720	21720	480022		Interest (Amort of Prem & Disc	212.86
02720	21720	600100		Operating Transfers In	0.00
02720	21720	600300		Unrealized Gains/Losses	-321.96
<b>Total Business Unit 21720</b>					<b>-558,769.47</b>
02720	22784	510250		Compliance Contracts	317.00
02720	22784	700100		Operating Transfers Out	0.00
<b>Total Business Unit 22784</b>					<b>317.00</b>
<b>Total 02720</b>					<b>-0.00</b>
<b>Grand Total</b>					<b>-0.00</b>

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 Duncan 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.

**RECITALS**

A. The City of Santa Fe adopted development impact fees most recently via ordinance 2014-28 as an update to its impact fees program, consistent with a 5-year update as required by the New Mexico Development Fees Act. Prior to the update, the city approved a 50% reduction of impact fees for new residential unit permits (2014-8). Ordinance 2014-8 (section 3) also required a review of the effects of the ordinance, ostensibly, to study the possible effects of the ordinance.

B. The City of Santa Fe requests a review and evaluation of the results and possible effects of the governing body's decision, via ordinance 2014-8, to reduce residential impact fees by 50% from those set out in the adopted impact fee schedule in SFCC§14-8.14(E).

C. The City is interested in utilizing the services, background and experience of Duncan Associates in conducting the required review, as Duncan Associates has been the city's impact fees consultant since 2002 and is therefore uniquely qualified through knowledge of the City's impact fees program to conduct this study.

D. This small contract is, in essence, an extension of the contract between the City and Duncan Associates for the five year update of City of Santa Fe impact fees program which included an update of the existing levels of service, an updated impact fees capital improvements program and updated schedule of impact fees. The analysis requested by this contract is related to the city's

reduction of fees and how uncollected fees might affect the ability to pay for or help construct the capital improvements listed as eligible for impact fee funds in the city's Impact Fees CIP.

1. SCOPE OF SERVICES

The Contractor shall provide the following services for the City as described and incorporated herein:

**Task 1: Project Understanding/Organization**

A. This contract is an all-inclusive contract including any gross receipts tax the contractor may be required to pay. The Contractor (Duncan Associates, Inc.) shall pay for all costs related to research and preparation of a report and copies of that report as required by the City. Any travel required of the consultant shall be agreed to by separate amendment to this contract.

B. The City of Santa Fe shall provide to the Contractor data relating to impact fee revenue by given time periods and numbers and types of residential building permits for new housing units by comparable time periods and other pertinent data that the City has available.

**Task 2: Research and Report Preparation**

A. The Contractor shall conduct research regarding the City of Santa Fe's new residential housing unit permit activity and related impact fee revenue for a period of years including and preceding both the 50% reduction in residential impact fees (beginning February 27, 2014) as well as the full (100%) suspension of residential impact fees from January, 2012 to January, 2014 to provide trends that may show correlations between the suspension/reduction of residential impact fees and the new housing unit permits and the relative levels of impact fee collection.

B. The Contractor shall also conduct and report on research regarding data from at least two other New Mexico cities with impact fees, over similar time periods, including those cities that have instituted residential impact fee suspensions/reductions in recent years, as a point of some

comparison with the City of Santa Fe. The level of detail obtained from other cities may be more aggregated, but should provide at least some comparison with Santa Fe during similar time periods.

C. The Contractor shall also conduct and report on research regarding similar time periods and the levels of new housing unit permits by city or in aggregate for New Mexico and the United States. These broader comparisons of data may be helpful in assessing Santa Fe's overall residential construction activity as it relates to impact fees, as well as comparing residential construction activity in Santa Fe as it compares to the state and nation overall.

**Task 3: Contractor Presentation**

A. The Contractor may be requested to travel to Santa Fe for the purpose of making in-person presentations. Any such request shall be covered by an amendment to this contract.

**Task 4: Final Report**

A. The Contractor shall prepare a final written report and provide twelve hard copies of the final report, as well as an electronic version.

**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 Seven Thousand Five Hundred dollars (\$7,500) inclusive of applicable gross receipts taxes.

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

C. One lump-sum payment shall be made upon receipt, approval and acceptance by the City of the final report. 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 shall terminate on March 1, 2016, 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) If 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.

(3) If compensation is based upon hourly rates and expenses, 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  
Housing & Community Development Dept.  
Post Office Box 909  
Santa Fe, NM 87504-0909

Contractor:  
Duncan Associates  
360 Nueces Street, # 2701  
Austin, TX 78701

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

CITY OF SANTA FE:

CONSULTANT:  
DUNCAN ASSOCIATES, INC.

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

\_\_\_\_\_  
NAME & TITLE

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

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

CRS# \_\_\_\_\_ 02361024007  
City of Santa Fe Business  
Registration # \_\_\_\_\_ 15-00110460

ATTEST:

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

APPROVED AS TO FORM:

   
\_\_\_\_\_  
KELLEY A. BRENNAN, CITY ATTORNEY

APPROVED:

\_\_\_\_\_  
OSCAR RODRIGUEZ, FINANCE DIRECTOR

\_\_\_\_\_  
12084.510340  
BUSINESS UNIT LINE ITEM



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
07/27/2015

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 be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Leatzow Insurance 500 W. Madison St. - Suite 3000 Chicago, IL 60661	<b>CONTACT NAME</b> Karen Bronson														
	<b>PHONE</b> (312) 930-5556 <b>FAX</b> (866) 741-2778														
	<b>EMAIL ADDRESS</b> karen@leatzowinsurance.com														
	<table border="1"> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> <tr> <td>INSURER A: New Hampshire Insurance Company</td> <td>23841</td> </tr> <tr> <td>INSURER B:</td> <td></td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: New Hampshire Insurance Company	23841	INSURER B:		INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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INSURER C:															
INSURER D:															
INSURER E:															
INSURER F:															
<b>INSURED</b> James Duncan & Associates, Inc. d/b/a: Duncan Associates 360 Nueces Street Suite 2701 Austin, TX 78701															

**COVERAGES**      **CERTIFICATE NUMBER:**      **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 INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS								
	<b>GENERAL LIABILITY</b> <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC			DOES NOT APPLY			EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL AND ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$								
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> Scheduled Autos <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> Non-owned Autos <input type="checkbox"/> Hired Autos			DOES NOT APPLY			COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$								
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			DOES NOT APPLY			EACH OCCURRENCE \$ AGGREGATE \$								
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> Y/N ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/>		N/A	DOES NOT APPLY			<table border="1"> <tr> <td>WC STATUTORY LIMITS</td> <td>OTHER</td> </tr> <tr> <td>E.L. EACH ACCIDENT</td> <td>\$</td> </tr> <tr> <td>E.L. DISEASE - EA EMPLOYEE</td> <td>\$</td> </tr> <tr> <td>E.L. DISEASE - POLICY LIMIT</td> <td>\$</td> </tr> </table>	WC STATUTORY LIMITS	OTHER	E.L. EACH ACCIDENT	\$	E.L. DISEASE - EA EMPLOYEE	\$	E.L. DISEASE - POLICY LIMIT	\$
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E.L. EACH ACCIDENT	\$														
E.L. DISEASE - EA EMPLOYEE	\$														
E.L. DISEASE - POLICY LIMIT	\$														
A	<b>PROFESSIONAL LIABILITY</b>			015622776	7/29/2015	7/29/2016	1,000,000 each occurrence 1,000,000 aggregate								

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

Re: Impact Fee Contract

<b>CERTIFICATE HOLDER</b> City of Santa Fe Attn: Reed Liming 120 South Federal Place, Room 321 Santa Fe, NM 87501	<b>CANCELLATION</b> 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 <i>Ethan Allen</i> LEATZOW INSURANCE
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## 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 Duncan Associates, Inc.

3 Complete information requested  Plus GRT  
 Inclusive of GRT

Original Contract Amount: \$7,500.00

Termination Date: March 1, 2016

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

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

**Contract is for:** Review of 50% Residential Impact Fee Reduction

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: \_\_\_\_\_

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

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

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

Other \_\_\_\_\_

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

7 Funding Source: Long Range Planning BU/Line Item: 12084.510340

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: Jessica Sandoval
Phone # xt. 6334

10 Certificate of Insurance attached. (if original Contract) [checked]

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:

Large empty rectangular box for comments.

