



# City of Santa Fe, New Mexico

## Memorandum



**DATE:** October 16, 2020

**TO:** Jarel LaPan Hill, City Manager

**VIA:** Mary McCoy, Finance Director  
Fran Dunaway, Chief Procurement Officer  
Alexis Lotero, Budget Officer  
Kyra Ochoa, Community Services Department Director *Kyra Ochoa*  
Kyra Ochoa (Oct 16, 2020 13:18 MDT)

**FROM:** Julie Sanchez, Youth and Family Services Division Director *JJS*

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### ITEM AND ISSUE:

Request of the approval of CARES Act CONNECT funding for a total amount of \$60,000.00 to Cerise Consulting to assist with managing the Division's twenty-three (23) CARES Act service contracts.

### BACKGROUND AND SUMMARY:

As part of the City's proposal for CARES Act funding, the Community Services Department was granted emergency flexible funds for residents affected by COVID-19 to be distributed to eligible City residents via the Connect network as well as funds for a project manager to assist with managing the Division's CARES Act funds. Our existing Connect network of health and human service safety-net providers, which was expanded in the spring when the City Council issued Emergency Funds, has established contracts with vendors for navigation services. All partners in the network have agreed to follow Connect protocols, including using a universal screening tool to determine needs regarding social determinants of health such as housing, food, transportation, utilities assistance, need for interpersonal safety, and childcare and using a shared care coordination platform, Unite Us, to enter eligible clients, screen, make referrals, and track client progress. The project manager will ensure compliance to the protocols as well as track invoicing and new clients in the Unite Us system.

### PROCUREMENT METHOD:

Since the contract fell under the 60k and below threshold procurement determined it would be a three quotes bid. Six local consulting firms were emailed or called and only one firm responded with a bid.

### CONTRACT NUMBER:

The FY20 Munis contract number is 3202340

### FUNDING SOURCE:

The funding source is:

**Fund Name/Number:** Health and Human Services Fund/240

**Munis Org Name/Number:** 2400122/Human Services

**Munis Object Name/Number:** Grants and Services Contracts/510400

### ACTION REQUESTED:

The Community Services Department respectfully requests your review and approval.






# CARES Project Manager Memo to CM

Final Audit Report

2020-10-16

Created:	2020-10-16
By:	Julie Sanchez (jjsanchez@ci.santa-fe.nm.us)
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## "CARES Project Manager Memo to CM" History

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CITY OF SANTA FE

PROFESSIONAL SERVICES CONTRACT

THIS AGREEMENT is made and entered into by and between the City of Santa Fe, New Mexico, hereinafter referred to as the “City,” and **CERISE CONSULTING**, hereinafter referred to as the “Contractor,” and is effective as of the date set forth below upon which it is executed by the Parties.

**PURPOSE**

This procurement only covers services, assets, and/or goods that are necessary due to the public health emergency with respect to the Coronavirus Disease 2019 (COVID-19) and incurred on or before December 30, 2020. Specifically, expenditures must be used for actions taken to respond to the public health emergency, such as medical expenses, public health expenses, expenses of actions to facilitate compliance with COVID-19-related public health measures, and other COVID-19-related expenses reasonably necessary to the function of government that satisfy the CARES Act Fund’s eligibility criteria.

This procurement does not cover damages covered by insurance; payroll or benefits expenses for employees whose work duties are not substantially dedicated to mitigating or responding to the COVID-19 public health emergency; expenses that have been or will be reimbursed under any federal program; reimbursement to donors for donated items or services; workforce bonuses other than hazard pay or overtime; severance pay; or legal settlements. All work must align with the purpose of this procurement.

IT IS AGREED BETWEEN THE PARTIES:

**1. Scope of Work.**

- A. The Contractor shall perform the following work:
  - 1) Builds and cultivates a strong network of health and human service community partners.
  - 2) Oversees contract creation and dispersing of CARES Act Funding into the Santa Fe community.
  - 3) Oversees and administers the Unite Us care coordination and outcome tracking software.
  - 4) Sets performance requirements and ensures compliance with CARES and City requirements.
  - 5) Develops effective communications and mechanisms for resolving conflicts.
  - 6) Answers day-to-day questions from subcontractors, city leadership and constituents
  - 7) Assists with managing billing and accounts payable for vendors and subcontractors.

- 8) Meet agreed upon milestones as set by the contractor and the Department and/or Division, *see Attachment 1*.

B. Performance Measures.

Contractor shall substantially perform the following Performance Measures:

- 1) Effective Stakeholder Engagement: Weekly meeting facilitation with key City of Santa Fe partners; continuous community member engagement and assistance with the reimbursement process.
- 2) Comprehensive Deliverables: Weekly progress reports and metrics; final report on lessons learned, challenges and recommendations.

2. Compensation.

A. The City shall pay to the Contractor in full payment for services satisfactorily performed at the rate of thirty thousand dollars (\$30,000.00) per month based upon meeting the desired milestones, such compensation not to exceed sixty thousand dollars (\$60,000.00), including gross receipts tax. **The total amount payable to the Contractor under this Agreement, including gross receipts tax and expenses, shall not exceed (\$60,000.00). This amount is a maximum and not a guarantee that the work assigned to be performed by Contractor under this Agreement 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 Agreement 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 Agreement 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 December 23, 2020. 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.

D. Contractor shall not commit funds or perform services worth more than [\$30,000.00] before [November 10, 2020] After providing services or goods worth [\$30,000.00],

regardless when that amount is spent, Contractor shall alert the City and not perform further services until given written authority by [Community Services Department Director], verifying that the initial amounts have been reimbursed by the State of New Mexico to the City. After the City has verified reimbursement from the State, Contractor may proceed. If the State denies reimbursement, the City and Contractor shall terminate this contract or negotiate changes to ensure future approval of reimbursement.

**3. Term.**

THIS AGREEMENT SHALL NOT BECOME EFFECTIVE UNTIL APPROVED BY THE CITY. This Agreement shall terminate on **December 30, 2020** unless terminated pursuant to paragraph 4 (Termination), or paragraph 5 (Appropriations). In accordance with Section 13-1-150 NMSA 1978, no contract term for a professional services contract, including extensions and renewals, shall exceed four years, except as set forth in Section 13-1-150 NMSA 1978.

**4. Termination.**

A. Termination. This Agreement 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 Agreement, 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 Agreement. The Contractor shall submit an invoice for such work within thirty (30) days of receiving or sending the notice of termination, or December 14, 2020, whichever comes first. Notwithstanding the foregoing, this Agreement 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 Agreement, 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 AGREEMENT.

B. Termination Management. Immediately upon receipt by either the City or the Contractor of notice of termination of this Agreement, the Contractor shall: 1) not incur any further obligations for salaries, services or any other expenditure of funds under this Agreement 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 Agreement; 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 Agreement. 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 Agreement are contingent upon sufficient appropriations and authorization being made by the City Council for the performance of this Agreement. If sufficient appropriations and authorization are not made by the City Council, this Agreement 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 Agreement to unilaterally reduce funding, the Contractor shall have the option to terminate the Agreement 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 Agreement. 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 Agreement or assign any claims for money due or to become due under this Agreement 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 Agreement without the prior written approval of the City. No such subcontract shall relieve the primary Contractor from its obligations and liabilities under this Agreement, nor shall any subcontract obligate direct payment from the City.

**9. Release.**

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

**10. 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.

**11. Product of Service -- Copyright.**

All materials developed or acquired by the Contractor under this Agreement shall become the property of the City and shall be delivered to the City no later than the termination date of this

Agreement. Nothing developed or produced, in whole or in part, by the Contractor under this Agreement 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 Agreement, shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance or services required under the Agreement.

B. The Contractor further represents and warrants that it has complied with, and, during the term of this Agreement, will continue to comply with, and that this Agreement 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 Agreement was entered into by the parties. Contractor shall provide immediate written notice to the City if, at any time during the term of this Agreement, 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 Agreement 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 Agreement 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 Agreement to the contrary, the City may immediately terminate the Agreement.

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 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.

**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 Agreement. If Contractor is found not to be in compliance with these requirements during the life of this Agreement, Contractor agrees to take appropriate steps to correct these deficiencies.

**17. Applicable Law.**

The laws of the State of New Mexico shall govern this Agreement, 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 Section 38-3-1 (G) NMSA 1978. By execution of this Agreement, 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 Agreement.

**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 Agreement may be terminated by the City.

**19. Professional Liability Insurance.**

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.

**20. Other Insurance**

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



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

**B. Business Automobile Liability** insurance for all owned, non-owned automobiles, with a combined single limit not less than \$1,000,000 per accident.

**C. Broader Coverage and Limits.** The insurance requirements under this Agreement 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 Agreement are sufficient to cover the obligations of Contractor hereunder.

**D.** Contractor shall maintain the above insurance for the term of this Agreement 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 retain all receipts of payment, invoices, and any other records of expense, and, if providing services to the City, shall maintain detailed time and expenditure records that indicate the date; time, nature and cost of all services rendered during the Agreement's term and effect. The Vendor shall retain the records for a period of five (5) years from the date of final payment. 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 Agreement 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 Agreement, 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 Agreement. 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 Agreement 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 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.

**24. Invalid Term or Condition.**

If any term or condition of this Agreement shall be held invalid or unenforceable, the remainder of this Agreement shall not be affected and shall be valid and enforceable.

**25. Enforcement of Agreement.**

A party's failure to require strict performance of any provision of this Agreement 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 Agreement 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 Agreement 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: [Julie Sanchez, Youth and Family Services Division, Po Box 909, Santa Fe NM 87504, [jsanchez@santafenm.gov](mailto:jsanchez@santafenm.gov)].

To the Contractor: [Cerise Consulting, 2245 Calle Cacique, Santa Fe NM 87505, [mollie@ceriseconsultants.com](mailto:mollie@ceriseconsultants.com)].

**27. Authority.**

If Contractor is other than a natural person, the individual(s) signing this Agreement 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.

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the date of the signature by the required approval authorities below.

CITY OF SANTA FE:

Jarel LaPan Hill

Jarel LaPan Hill (Oct 20, 2020 08:43 MDT)

JAREL LAPAN HILL  
CITY MANAGER

DATE: Oct 20, 2020

ATTEST:

Yolanda Y. Vigil

YOLANDA Y. VIGIL, CITY CLERK

CITY ATTORNEY'S OFFICE:

XIV  
XIV

Marcos Martinez

Marcos Martinez (Oct 7, 2020 09:55 MDT)

SENIOR ASSISTANT CITY ATTORNEY

APPROVED:

Mary McCoy

MARY MCCOY, FINANCE DIRECTOR

2400122.510400

Org. Name/Org#.

AL  
AL

CONTRACTOR:  
CERISE CONSULTING

Mallie Parsons

NAME  
Consultant

TITLE

DATE: 10/7/2020

CRS# 03-531701-00-9

Registration # 228382

## ATTACHMENT 1

Timeline and Milestones:



<b>STEP 1:</b> Formalize the Plan & Build Network Capacity	X				
<b>STEP 2:</b> Project Implementation		X	X	X	
<b>STEP 3:</b> Ensure Fund Distribution & Paperwork Completion				X	
<b>STEP 4:</b> Project Completion					X

# 2020 10 07 Professional Services Contract CARES\_Cerise Consulting MP edits

Final Audit Report

2020-10-07

Created:	2020-10-07
By:	Irene Romero (ikromero@ci.santa-fe.nm.us)
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Document e-signed by Marcos Martinez (mdmartinez@santafenm.gov)

Signature Date: 2020-10-07 - 3:55:55 PM GMT - Time Source: server- IP address: 174.56.49.116



Agreement completed.

2020-10-07 - 3:55:55 PM GMT

# CARES ACT Project Management

## PROCUREMENT LOG

(Purchase at \$60,000)

Vendor Name:	Michele Lis Consulting	Cerise Consulting	Serna Solutions	Luz Del Sol, LLC	M&O Consulting	Elizabeth Peterson Consulting
Email:	<a href="mailto:mlconsulting03@gmail.com">mlconsulting03@gmail.com</a>	<a href="mailto:molltergs@gmail.com">molltergs@gmail.com</a>	<a href="mailto:briserna@yahoo.com">briserna@yahoo.com</a>	<a href="mailto:marisol.atkins@gmail.com">marisol.atkins@gmail.com</a>	<a href="mailto:psi@mac.com">psi@mac.com</a>	<a href="mailto:elizabethpetersonmph@gmail.com">elizabethpetersonmph@gmail.com</a>
Phone:	(505) 670-2370	(401) 524-4450	(505) 207-8929		(505) 660-9393	(505)983-6957
Bid Quote:	\$0.00	\$60,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Date Contacted:	9/24/2020	9/24/2020	9/24/2020	9/24/2020	9/24/2020	9/24/2020
Outcome:	No Response	Provided Lowest Bid	No Response	Not Interested (verbal)	No Response	No Response



## CITY OF SANTA FE PROCUREMENT CHECKLIST

Contractor Name: Cerise Consulting

Procurement Title: Project Management: YFS CARES Act Funding

Procurement Method: State Price Agreement ☐ Cooperative ☐ Sole Source ☐ Other ☐ \_\_\_\_\_

Exempt ☐ Request For Proposal (RFP) ☐ Invitation To Bid (ITB) ☐ Contract under 60K ☒ Contract over 60K ☐

Department Requesting Community Services Staff Name Julie Sanchez

### 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"/>	Memo addressed to City Manager (under 60K) Committees/City Council (over 60K)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	State Price Agreement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	RFP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Evaluation Committee Report
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ITB
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bib Tab
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Quotes (3 valid current quotes)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cooperative Agreement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sole Source Request and Determination Form
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contractors Exempt Letter
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Purchasing Officers approval for exempt procurement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	BAR
<input type="checkbox"/>	<input checked="" type="checkbox"/>	FIR
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Executed 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 checked="" type="checkbox"/>	<input type="checkbox"/>	All documentation presented to Committees
<input type="checkbox"/>	<input type="checkbox"/>	Other: _____

Julie Sanchez Youth and Family Services Division Director 10/16/20

Department Rep Printed Name (attesting that all information included) Title Date

  
 Fran Dunaway (Oct 16, 2020 15:59 MDT)

Purchasing Officer (attesting that all information is reviewed) Title Date

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

\*



# City of Santa Fe

## Real Estate Summary of Contracts, Agreements, Amendments & Leases

### Section to be completed by department

1. Munis Contract # 3202340

Contractor: Cerise Consulting

Description: Project management consultants for the Youth and Family Division's CARES Act funds

Contract ☒ Agreement ☐ Lease / Rent ☐ Amendment ☐

Term Start Date: when signed Term End Date: 12/30/20

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

### **Contract / Lease: Project Management Consultants for YFS CARES Act Funds**

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

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

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

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

### **Amendment is for:**

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

3. Procurement History: Contract 60k or under

Fran Dunaway (Oct 16, 2020 15:59 MDT)

Purchasing Officer Review: \_\_\_\_\_

Oct 16, 2020

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

Comment & Exceptions: \_\_\_\_\_

4. Funding Source: Health and Human Services (240)

Org / Object: 2400122.510400

Alexis Lotero (Oct 16, 2020 15:51 MDT)

Oct 16, 2020

Budget Officer Approval: \_\_\_\_\_

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

Comment & Exceptions: \_\_\_\_\_

Staff Contact who completed this form: Julie Sanchez Phone # 955-6678

Email: jjsanchez@santafenm.gov

To be recorded by City Clerk:

Clerk # \_\_\_\_\_

Date of Execution: \_\_\_\_\_





**City of Santa Fe**  
Treasury Department  
200 Lincoln Ave.  
Santa Fe, New Mexico 87504-0909  
505-955-6551

## BUSINESS REGISTRATION

**Business Name:** CERISE CONSULTING  
DBA: CERISE CONSULTING LLC

**Business Location:** 2245 CALLE CACIQUE  
Santa Fe, NM 87505

**Owner:** MOLLIE PARSONS

**License Number:** 228382

**Issued Date:** October 09, 2020

**Expiration Date:** October 09, 2021

**CRS Number:** 03-531701-00-9

**License Type:** Business License - Renewable

**Classification:** Business Registration - Standard

**Fees Paid:** \$35.00

CERISE CONSULTING  
2245 CALLE CACIQUE  
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**



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/01/2020

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

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

<b>PRODUCER</b> Hiscox Inc. 520 Madison Avenue 32nd Floor New York, NY 10022	<b>CONTACT NAME:</b>	
	<b>PHONE (A/C, No, Ext):</b> (888) 202-3007	<b>FAX (A/C, No):</b>
<b>INSURED</b> Cerise Consulting 2245 Calle Cacique Santa Fe, NM 87505	<b>E-MAIL ADDRESS:</b> contact@hiscox.com	
	<b>INSURER(S) AFFORDING COVERAGE</b>	
	<b>INSURER A:</b> Hiscox Insurance Company Inc	
	<b>INSURER B:</b>	
	<b>INSURER C:</b>	
	<b>INSURER D:</b>	
<b>INSURER E:</b>		
<b>INSURER F:</b>		
<b>NAIC #</b> 10200		

**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 INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b>						
	<input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR						EACH OCCURRENCE \$
							DAMAGE TO RENTED PREMISES (Ea occurrence) \$
							MED EXP (Any one person) \$
							PERSONAL & ADV INJURY \$
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE \$
	<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						PRODUCTS - COMP/OP AGG \$
	OTHER:						\$
	<b>AUTOMOBILE LIABILITY</b>						
	<input type="checkbox"/> ANY AUTO						COMBINED SINGLE LIMIT (Ea accident) \$
	<input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS						BODILY INJURY (Per person) \$
	<input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
							\$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR						EACH OCCURRENCE \$
	<b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE						AGGREGATE \$
	DED <input type="checkbox"/> RETENTION \$						\$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>						
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y <input type="checkbox"/> N						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/>
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. EACH ACCIDENT \$
							E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability	N		UDC-4618706-EQ-20	10/01/2020	10/01/2021	Each Claim: \$ 1,000,000 Aggregate: \$ 1,000,000

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

**CERTIFICATE HOLDER****CANCELLATION**City of Santa Fe  
200 Lincoln Ave Santa Fe, NM 87504

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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**Signature:** Xavier Vigil  
Xavier Vigil (Oct 20, 2020 08:26 MDT)

**Email:** xivigil@santafenm.gov

# CM COMM SVS CERISE CONSULTING

Final Audit Report


2020-10-20

Created:	2020-10-16
By:	YODEL CATANACH (yocatanach@ci.santa-fe.nm.us)
Status:	Signed
Transaction ID:	CBJCHBCAABAA_paalZjG_s6GBk5eCoQe7vVyOIkpxHic

## "CM COMM SVS CERISE CONSULTING" History

 Document created by YODEL CATANACH (yocatanach@ci.santa-fe.nm.us)

2020-10-16 - 9:16:45 PM GMT- IP address: 63.232.20.2

 Document emailed to Alexis Lotero (aclotero@santafenm.gov) for signature

2020-10-16 - 9:23:49 PM GMT

 Email sent to jjsanchez@santafe.nm.gov bounced and could not be delivered


2020-10-16 - 9:24:01 PM GMT

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2020-10-16 - 9:41:37 PM GMT- IP address: 104.47.65.254

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2020-10-20 - 2:15:25 PM GMT- IP address: 104.47.65.254


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Signature Date: 2020-10-20 - 4:22:32 PM GMT - Time Source: server- IP address: 63.232.20.2

 Agreement completed.  
2020-10-20 - 4:22:32 PM GMT