



# City of Santa Fe, New Mexico

## Memorandum



**DATE:** November 12, 2020

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

**VIA:** Mary McCoy, Finance Department Director  
Fran Dunaway, Chief Procurement Officer  
Kyra R. Ochoa, Community Services Director *Kyra Ochoa*  
Kyra Ochoa (Nov 12, 2020 15:19 MST)

**FROM:** Gail L. Vigil, Contracts Administrator

### ITEM AND ISSUE:

Carson Block consulting Inc. under \$20k request for the approval of Professional Service agreement in the Total amount of \$19,500.00 for purchase of Consulting services for the Library.  
Term 11/20-12/30/2020; Carson Block Consulting Inc.  
Gail L. Vigil, [glvigil@santafenm.gov](mailto:glvigil@santafenm.gov) 505-955-6789

### BACKGROUND AND SUMMARY:

The Library, as part of its mission to the public, provides access to a variety of educational materials for the Community of Santa Fe. Due to the Covid-19 Pandemic and Library closures, the Library has had to develop new & creative ways to serve our Community. Carson Block Consulting helps Libraries create plans for the service design and deployment of mobile technology devices to serve library patrons during the Covid-19 emergency. The plan includes technology consulting, recommendations for hardware, software (user devices, WiFi spots) and policy development. The goal is to create a library technology plan to ensure Covid-safe practices while providing technology to the community.

### PROCUREMENT METHOD:

Under \$20K

### CONTRACT NUMBER:

The FY20/21 Munis contract number is 3202416

### FUNDING SOURCE:

The funding source is:

**Fund Name/Number:** Library/Fund 251/CARES20LIB

**Munis Org Name/Number:** Library Programs/2510101

**Munis Object Name/Number:** Data Processing/572800

### ACTION REQUESTED:

Community Services/Library respectfully requests your review and approval.



# City of Santa Fe

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

### Section to be completed by department

1. Munis Contract # 3202416

Contractor: Carson Block Consulting Inc.

Description: Create a plan for the service design & deployment of mobile technology devices to serve library patrons during the COVID-19.  
CARES ACT FUNDS- CARES20LIB

Contract ☒ Agreement ☐ Lease / Rent ☐ Amendment ☐

Term Start Date: 11/23/2020 Term End Date: 12/30/2021

☐ Approved by Council

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

### Contract / Lease:

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: Quote

*John Denney*

Nov 15, 2020

Purchasing Officer Review:

Date:

Comment & Exceptions: Statewide Price Agreement - CARES ACT FUNDS 12/30/20

### 4. Funding Source: Library programs - CARES20LIB

*Alexis Lotero*

Alexis Lotero Nov 11, 2020 13:19 MDT

Org / Object: 2510101.572800

Nov 13, 2020

Budget Officer Approval:

Date:

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

Staff Contact who completed this form: Gail L. Vigli

Phone # 505-955-6789

Email: glvigli@santafenm.gov

### To be recorded by City Clerk:

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

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



## CITY OF SANTA FE PROCUREMENT CHECKLIST

Contractor Name: Carson Block Consulting Inc

Procurement Title: Consulting Services For Santa Fe Public Library CARES ACT

Procurement Method: State Price Agreement ☐ Cooperative ☐ Sole Source ☐ Other ☒ Quote

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

Department Requesting Community Services/Library Staff Name Gail L. Vigil

### 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 type="checkbox"/>	<input checked="" 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 type="checkbox"/>	Contractors Exempt Letter
<input type="checkbox"/>	<input 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 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 type="checkbox"/>	All documentation presented to Committees
<input type="checkbox"/>	<input type="checkbox"/>	Other: _____

Gail L. Vigil

Contracts Administrator

11/12/2020

Department Rep Printed Name (attesting that all information included)

Title

Date

*Gina Duran*

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**

**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 Carson Block Consulting Inc., hereinafter referred to as the "Contractor," and is effective as of the date set forth below upon which it is executed by the Parties.

**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 as described in Attachment "1".

**B. Performance Measures.**

Contractor shall substantially perform the following Performance Measures and as described in Attachment "1":

- 1) Create a plan for the service design, procurement and deployment of mobile technology devices to serve library patrons during the Covid-19 emergency.
  - a. Technology support, Computer platforms (user devices, WiFi spots)
  - b. Launch technology procurement process
  - c. Identify technology support vendor
- 2) Create Draft deployment schedule:
  - a. Startup costs
  - b. Service agreements & Support

c. Replacement costs

- 3) Create Recommendations for a full library technology plan to ensure Covid safe practices while providing technology to the community.

2. Compensation.

A. The City shall pay to the Contractor in full payment for services satisfactorily Performed, such compensation not to exceed nineteen thousand five hundred dollars (\$19,500), excluding gross receipts tax. The total amount payable to the Contractor under this Agreement, including gross receipts tax and expenses, shall not exceed (\$19,500). 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 30, 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.

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 (C) 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: City of Santa Fe Library  
Maria E. Tucker, Library Director  
145 Washington Ave.  
Santa Fe, NM 87501  
metucker@santafenm.gov

To the Contractor: Carson Block Consulting Inc.  
2913 Michener Court  
Fort Collins, CO 80526  
lleather.z.block@gmail.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

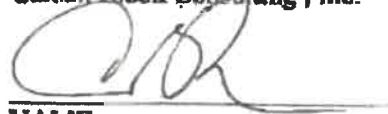
Jarel LaPan Hill (Nov 17, 2020 14:28 MST)

JAREL LAPAN HILL, CITY MANAGER

DATE: Nov 17, 2020

CONTRACTOR:

Carson Block Consulting, Inc.



NAME

PRESIDENT, CARSON BLOCK CONSULTING, INC.

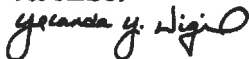
TITLE

DATE: 11/10/2020

CRS#

Registration #

ATTEST:



YOLANDA Y. VIGIL, CITY CLERK

XIV  
XIV

**CITY ATTORNEY'S OFFICE:**

*Marcos Martinez*  
MAY 17 2020 10:01 AM

**SENIOR ASSISTANT CITY ATTORNEY**

**APPROVED:**

*Mary McCoy*

**MARY MCCOY, FINANCE DIRECTOR**

Org. Name/Org#.

## **1. Cover Letter for the Santa Fe Public Library Strategic Technology Plan**

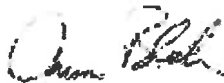
I'm delighted to propose this scope of work for the Santa Fe Public Library!

Technology is integral to the mission and purpose of each library in its community. No longer considered as separate from other priorities, modern libraries are harnessing & integrating technology as a strategic asset to help deliver traditional, emerging and future services to patrons. With technology as one of the engines, libraries are transforming from static warehouses of information to active, service-based knowledge organizations.

With more than 25 years of experience as a library technologist (and six as a library technology consultant) Carson Block understands how technology impacts modern library service design (both physical and virtual) and how to incorporate the right concepts to help a library keep pace with an ever-changing future. At its best, technology design and planning for libraries emphasizes investment in core toolsets designed to serve the library over time. A key piece is ensuring that technology is designed to "scale" and adapt.

Carson Block Consulting Inc. is a full-service library technology-consulting firm established as Carson Block LLC in 2010, and incorporated as Carson Block Consulting Inc. in 2012. Primary areas of consulting including library technology planning; facilities and services master planning; IT Department audits, assessments, and improvement plans; and teaching, training, facilitation and public speaking on library technology and general library advocacy topics.

Sincerely,



Carson Block, President  
Carson Block Consulting Inc  
2913 Michener Court  
Fort Collins CO 80526

Ph: (970) 673-7475  
<http://www.carsonblock.com/>  
Twitter: @CarsonBlock

# Santa Fe Public Library Technology Strategic Plan

Proposal  
June 2020



<http://www.carsonblock.com>

## 2. Qualifications

### Qualifications and Experience

Carson Block Consulting Inc. is a full-service library technology consulting firm established as Carson Block LLC in 2010, and incorporated as Carson Block Consulting Inc. in 2012. Primary areas of consulting including library technology planning; facilities and services master planning; IT Department audits, assessments, and improvement plans; and teaching, training, facilitation and public speaking on library technology and general library advocacy topics.

The most relevant Library Technology Planning, Comprehensive Planning, and other Planning clients are listed below. *Technology planning projects currently in-progress or completed within the last 5 years are marked with an asterix.*

#### Technology Planning

- |                                     |                   |
|-------------------------------------|-------------------|
| • Sonoma County Libraries*          | Sonoma County, CA |
| • Solano County Libraries *         | Solano County, CA |
| • Lexington Public Library *        | Lexington, KY     |
| • Teton County Libraries *          | Jackson, WY       |
| • Georgia PINES Network *           | Atlanta, GA       |
| • eNetwork *                        | Pittsburgh, PA    |
| • Flower Mound Public Library *     | Flower Mound, TX  |
| • Central Arkansas Library System * | Little Rock, AR   |
| • Tacoma Public Library             | Tacoma, WA        |
| • Anchorage Public Library          | Anchorage, AK     |
| • Pierce County Libraries           | Tacoma, WA        |
| • Santa Cruz Public Library         | Santa Cruz, CA    |
| • Delaware Department of Libraries  | Dover, DE         |
| • Poudre River Public Lib District  | Ft. Collins, CO   |

#### Strategic Planning

- |  |                       |
|--|-----------------------|
| • Poudre River Public Library District *       | Fort Collins, CO      |
| • Miami-Dade Public Library System*            | Miami-Dade County, FL |
| • New Jersey State Library (strategic study) * | Trenton, NJ           |
| • Johnson County Libraries*                    | Johnson County, KS    |
| • Los Angeles Public Library                   | Los Angeles, CA       |
| • Muskingum County Libraries                   | Zanesville, OH        |
| • Iowa City Public Library                     | Iowa City, IA         |
| • Provo City Library (for Google Fiber)        | Provo, UT             |
| • Vigo County Libraries                        | Terra Haute, IN       |

# **Santa Fe Public Library Technology Strategic Plan**

Proposal  
June 2020



<http://www.carsonblock.com>

## **Technology Assessment/Documentation for Construction Projects**

- |                                    |                 |
|------------------------------------|-----------------|
| • Route 9 Library                  | Wilmington, DE  |
| • Olathe Public Library            | Olathe, KS      |
| • Hewitt Public Library            | Hewitt, TX      |
| • Seguin Public Library            | Seguin, TX      |
| • Claverack Public Library         | Claverack, NY   |
| • Cairo Public Library             | Cairo, NY       |
| • Artesia Public Library           | Artesia, NM     |
| • Poudre River Public Lib District | Ft. Collins, CO |

## **Analysis for Technology**

- |   |                       |
|---|-----------------------|
| • Salt Lake City Libraries              | Salt Lake City, UT    |
| • Tacoma Public Library                 | Tacoma, WA            |
| • Iowa City Public Library              | Iowa City, IA         |
| • Muskingum County Libraries            | Zanesville, OH        |
| • Dayton Metro Libraries                | Dayton, OH            |
| • Denver Public Library                 | Denver, CO            |
| • Pierce County Libraries               | Tacoma, WA            |
| • Davies Public Library                 | Owensboro, KY         |
| • East Bonner Library District          | Sand Point, ID        |
| • Broomfield Public Library             | Broomfield, CO        |
| • Front Range Community College Library | Westminster, CO       |
| • Sterling Public Library               | Sterling, CO          |
| • Clearview Library District            | Windsor, CO           |
| • Red Feather Lakes Public Library      | Red Feather Lakes, CO |
| • Lyons Public Library                  | Lyons, CO             |
| • Bucks County Free Library Assoc.      | Doylestown, PA        |

## **Facilities Master Planning**

- |                                    |                    |
|------------------------------------|--------------------|
| • Johnson County Libraries         | Johnson County, KS |
| • Anchorage Public Library         | Anchorage, AK      |
| • New Braunfels Public Library     | New Braunfels, TX  |
| • Round Rock Public Library        | Round Rock, TX     |
| • Seguin Public Library            | Seguin, TX         |
| • Lyons Public Library             | Lyons, CO          |
| • Poudre River Public Lib District | Ft. Collins, CO    |

A full listing of consulting experience is available upon request.



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<http://www.carsonblock.com>

## **3. Scope of Services and Draft Schedule**

The primary deliverable from this Scope of Services is to create a plan for the service design, procurement and deployment of mobile technology devices to serve library patrons.

The consultant will work cooperatively with the library and stakeholders as identified by the library to complete the tasks and outcomes described in this scope of work. The majority of this work will be performed remotely. If feasible, a site visit by the consultant may be performed (TBD).

This draft schedule is the consultant and library's current plans to meet the library's objectives. The tasks and schedule may be modified and/or updated by mutual consent of the library and consultant to meet the goals of the work.

<b>Timeframe or Deadline</b>	<b>Task</b>	<b>Who?</b>	<b>Deliverable</b>
<b>Immediately</b>	<b>Form Library Project Team</b>  <b>Perform Initial/Immediate needs assessment to include:</b> <ul style="list-style-type: none"> <li>• Target populations</li> <li>• Computer platforms (to include user devices, WiFi hot-spots and other possible items)</li> <li>• Distribution/circulation methods</li> <li>• Circulation Support (including distribution points and methods)</li> <li>• Technology Support</li> </ul>	<b>Consultant, library, and any other key stakeholders as identified by the library)</b>	<b>Findings Report, including specifications for equipment</b>  <b>Procurement Schedule</b>
<b>October</b>	<b>Perform additional stakeholder needs assessment to help ID needs and distribution opportunities after soft launch</b>	<b>Consultant</b>	<b>Surveys, focus groups and/or interviews (most effective and timely methods TBD)</b>

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By Late October	<ul style="list-style-type: none"> <li>• Launch technology procurement process</li> <li>• Identify technology support vendor for the program</li> </ul>	Consultant, Library, Library's purchasing entities	Information needed for procurement process
November - December	Create draft deployment schedule	Consultant	Schedule document
December	<p>Create document that includes identification of startup and ongoing costs to include:</p> <ul style="list-style-type: none"> <li>• Startup costs</li> <li>• Service Agreements and support</li> <li>• Anticipated replacement costs at "End of Life" for devices.</li> </ul>	Consultant	
December	Create recommendations for a full library technology planning effort (noting challenges such as a lack of City support and other conditions/needs that emerge as a result of the planning process)	Consultant	

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## **4. Cost**

The fee estimate for the proposed scope of work is \$19,500, inclusive of expenses.

Fees are based on the consultant's rate of \$200/hour.

## **Key Personnel**

Carson Block, President of Carson Block Consulting Inc. will perform the primary work described in this proposal.

Carson Block has an assistant, Bonnie Nichols, who will perform administrative tasks including scheduling meetings, creating schedules, creating meeting notes, and other tasks.

## **Qualifications: Brief Bio -Carson Block:**

Carson Block has been a library technologist for 20 years – as a library worker, IT Director and now a Library Technology Consultant. He has been called "a geek who speaks English" and enjoys acting as a bridge between the worlds of librarians and hard-core technologists. He has a passion to demystify technology for the uninitiated, and to help IT professionals understand and support the goals of libraries.

As a consultant, Carson is often brought in to help solve complex institutional issues and to help align the library's public service mission with its technology efforts to serve the needs of patrons and staff.

Carson's work includes technology strategic planning; technology visioning and future-proofing; library service design; facilities master planning; library technology architectural programming and budgeting for new library construction and remodeling projects; facilities master planning; analysis of IT structure and staffing; IT position recruiting, digital cultural heritage projects and more.

Carson is a humorous, energetic and engaging facilitator, and a frequent speaker and webinar presenter for library events and beyond – including bringing messages of library advocacy to South by Southwest Interactive (SXSW) in 2012 and 2013 (covered by Time magazine at <http://techland.time.com/2012/03/11/sxsw-the-fate-of-libraries/>). Carson also presented at SXSW Film in 2015 and 2016 and also played as a solo act during the music conference.

Carson is a Director-At-Large for the American Library Association's Association of Special and Cooperative Library Agencies (ASCLA) and is a past Chair of ASCLA's Library Consultant's Interest Group. He is also a member of the Future of Libraries advisory group to ALA's Office of Information Technology Policy, and a member of the former 21<sup>st</sup> Century Libraries Committee of the ALA's Office of Information Technology Policy (OITP). Carson is also Past President of the Colorado Division of the Public Library Association. Carson continues to advocate for libraries through many activities,

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including facilitating a group of librarians (called lib\*interactive) engaging the technology, film and music communities at the SXSW conference.

Carson is the author of *Managing Library Technology: A LITA Guide* (Rowman & Littlefield 2017).

## **5. Insurance**

Please see below for a sample Certificate of Insurance showing the consultant's current coverage.



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

7/10/2020

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>		<b>CONTACT NAME:</b>	
TRUENORTH COMPANIES LC 8480 E ORCHARD RD STE 6200 GREENWOOD VILLAGE CO 80111		PHONE (A/C No. Ext): (800) 308-7143 E-MAIL: Certificate@Hanover.com FAX (A/C No.): (866) 828-2424	
<b>INSURED</b>		<b>INSURER(S) AFFORDING COVERAGE</b>	
CARSON BLOCK CONSULTING INC 2913 MICHENER CT FORT COLLINS CO 80526		<b>INSURER A:</b> Hanover Insurance Co <b>INSURER B:</b> <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>	
		<b>NAIC #</b> 22292	

**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.

W&R LTR	TYPE OF INSURANCE	ADDL SUBR INSD: WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:	N N	OH4 D324736 02	10/15/2019	10/15/2020	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	N N	OH4 D324736 02	10/15/2019	10/15/2020	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> EXCESS LIAB DED RETENTION \$ OCCUR CLAIMS-MADE					EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/> N/A				PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

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

**CERTIFICATE HOLDER****CANCELLATION**

FOR INFORMATIONAL PURPOSES ONLY

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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### **6. References**

#### **Carson Block References**

Please see below for references; additional references, including most-recently completed projects or projects-in-process, are available upon request.

#### **Client: Central Arkansas Library System (CALS) - Technology Assessment, Recruitment & Technology Planning**

**Carol Coffey**  
Director of Library Resources |  
Central Arkansas Library System  
100 Rock St. | Little Rock, AR 72201  
501.918.3008 | [www.cals.org](http://www.cals.org)  
[ccoffey@cals.org](mailto:ccoffey@cals.org)

#### **Tasks Performed/Accomplishments Achieved:**

Technology Assessment, Technology Leader Recruitment, and Technology Plan. The CALS technology plan is included in this proposal.

#### **Client: EiNetwork - Strategic Plan**

**Rebecca Serey**  
Executive Director, eiNetwork  
4400 Forbes Ave Pittsburgh PA 15213  
(412) 622-6263  
[sereyr@einetwork.net](mailto:sereyr@einetwork.net)  
<http://www.einetwork.net/ein/index.html>

#### **Tasks Performed/Accomplishments Achieved**

For this project, Carson Block Consulting Inc created and conducted the planning process; engaged stakeholders at all levels; performed assessment activities; led the planning team; and drafted the plan language.

The eiNetwork is a provider of shared technology services for the Carnegie Library of Pittsburgh and other libraries throughout Allegheny County. The planning process resulted in a new, living document called the *eiN Services Matrix* designed to define eiN services to Client Libraries over time and to be updated, monitored and amended over time. The document is both a framework to introduce actions of the strategic plan over time, and a single place to communicate with members to clearly define services, levels of service, and other expectations.

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The *eIN Services Matrix* increases productivity for the eIN Network and Member Libraries by having a single point of reference to define services and levels of service, leading to an increased and shared understanding between eINetwork and Client Libraries. It also leads to service enhancements by providing a base definition of services and levels of service, with the avenue (defined within the strategic plan) to modify and improve services and service levels over time. Quantifiable data on additions to the "eIN Services Matrix" and progress on Strategic Plan goals and actions will be collected and shared regularly as part of eIN's reporting process to its board (the plan was released in late 2016).

### **Client: Delaware Division of Libraries - Various**

Anne E.C. Norman, Director / State Librarian  
Delaware Division of Libraries / State Library  
43 S DuPont Hwy Dover DE 19901  
302-739-4748 / fax 302-739-6787  
[anne.norman@state.de.us](mailto:anne.norman@state.de.us)

#### **Tasks Performed/Accomplishments Achieved**

Carson Block Consulting Inc has performed numerous tasks for DDL over the past several years, including contributions to DDL's state technology planning efforts; improvements to technology assessments and construction projects (including the Route 9 Library in Wilmington); stakeholder facilitation and general advisement around technology approaches and strategy.

### **Client: Colorado State Library - Technology Assessments**

Sharon Morris  
Director, Library Development  
Colorado State Library  
P 303.856.6730  
201 East Colfax Avenue, Room 309, Denver, CO 80203  
[Morris\\_S@cde.state.co.us](mailto:Morris_S@cde.state.co.us) | [www.cde.state.co.us](http://www.cde.state.co.us)

#### **Tasks Performed/Accomplishments Achieved**

Carson Block Consulting Inc performed a series of technology assessments for 11 rural libraries in Colorado in 2013-2014. Each library received a detailed report with suggested action steps to improve their processes regarding connectivity, IT support, and services to patrons. While national efforts to improve broadband connectivity have focused on improving the "last mile" of connections, it has become increasingly important to also improve the "last 100



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meters" of connectivity for all libraries – which is the internal network connectivity (including wired and wireless connections) – to serve members of the local community. Libraries of all sizes – from large metro libraries with up to a hundred interconnected locations to small, single-site libraries benefit from highly-functioning data networks. The results of the Colorado work resulted in recommendations for lower-cost connections and increased services by identifying obsolete and poorly functioning equipment (and providing recommendations to improve the equipment); improvements to the methods and actions of IT professionals serving the libraries; and suggesting improvements to poorly-configured equipment to improve services for members of the community served by the library.

This effort in Colorado laid the groundwork for a recently completed ISTA-funded project Carson performing with Internet2 – creating a self-guided "toolkit" for rural and tribal libraries to use to self-assess and diagnose technology infrastructure needs: <https://internet2.edu/tel/>

### **Client: Dayton Metro Library**

**Tim Kambitsch, Executive Director**

**Dayton Metro Library**

215 E. Third St Dayton OH 45402

(937) 463-2665

[TKambitsch@daytonmetrolibrary.org](mailto:TKambitsch@daytonmetrolibrary.org) <http://www.daytonmetrolibrary.org/>

### **Tasks Performed/Accomplishments Achieved**

Carson Block Consulting Inc created a technology assessment and program recommendations for a "refresh" of all libraries (new and remodeled) for the Dayton Metro Library system. Deliverables included a study and process improvement recommendations for branch-to-branch materials handling (including Courier delivery) and Technical Services (materials processing and delivery). The recommendations were implemented by the architect team and the library as part of new construction design and a move to a new "Service Center" location for library administrative departments.

Like many libraries, Dayton Metro adapted physical workflow to a building (its Main Library) that had become more efficient over time. In the old Main Library, delivery and transport of courier materials were on different floors of the library, and were transported via an old and ill-performing elevator. Similarly, its Technical Services Department had adapted to imperfect spaces, resulting in a circuitous and inefficient flow of materials during processing (from acquisition to distribution to library shelves). I worked with courier and Technical Services staff to accurately document their current workflows and design improvements (removing steps and promoting as a much of a "straight line" orientation) for a new "Service Center" facility.

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**Melissa Stockton References**

**Carol Frost**  
CEO, Pacific Library Partnership  
Executive Director, Peninsula Library System  
Phone: (650) 349-5538  
Email: [frost@plpinfo.org](mailto:frost@plpinfo.org)

The Silicon Valley Library System (SVLS) is a small consortium which has been investigating new resource sharing opportunities for the group. Melissa completed a Unified ILS Platform Study, gathering data through online surveys and in-person meetings with the member libraries. The project deliverable was a final report detailing several resource sharing options available to the group, including the implementation of a shared ILS. Melissa presented the report to the SVLS Director's, describing the resource requirements for each option providing long and short-term recommendations.

**Rebecca Malinowski**  
Executive Director, Cooperative Computer Services  
Phone: (847) 483-8604  
Email: [rmalinowski@ccslib.org](mailto:rmalinowski@ccslib.org)

Cooperative Computer Services (CCS) is a consortium of 24 public libraries in Illinois. Melissa worked with the group through an ILS selection and procurement process. The Needs Assessment process phase was completed after an internal evaluation of potential products, concentrating on the highest priority features desired by the group. An RFP was released and Melissa assisted with the review of proposals and a number of post-RFP meetings and targeted demonstrations with vendors. The group decided to move to an innovative Polaris solution and Melissa assisted with contract negotiations.

**Wennie Fleming**  
Integrated Library System Librarian  
Loudoun County Public Library  
Phone: (703) 777-0580  
Email: [wennie.fleming@loudoun.gov](mailto:wennie.fleming@loudoun.gov)

Loudoun County Public Library contracted with Quipu Group for consulting services to assist with their ILS selection and procurement project. Melissa completed a Needs Assessment process to develop the functional requirements for an RFP process. Melissa was involved in the RFP review and the vendor demonstrations and provided support through the final decision as well as contract negotiations. The Library selected the CARLX system from The Library Corporation.

## **7. Additional Services**

The Santa Fe Public Library may wish to explore additional services from the consultant outside of those described in this scope proposal. Clients often engage the consultant to assist with process or project design, management, coaching, and other tasks where the library requires additional capacity to perform or accomplish such needs. Additional services are available as a lump-sum project fee, or at the consultant's rate of \$200/hour plus expenses.